

California Student Aid Commission

2017 Regional Training

***Presented By:
California Student Aid
Commission***



California Student Aid Commission

Cal Grant Overview





Cal Grant Application Process

Making education beyond high school financially accessible to all Californians.



Application Submission



Making education beyond high school financially accessible to all Californians.



Application Deadlines

March 2nd

- Students attending any Cal Grant Eligible School can apply
- Cal Grant A, B, and C awards granted
- Entitlement and Competitive awards

September 2nd

- Only for California Community Colleges (CCC)
- Students must be *enrolled* in the CCC by Sept. 2nd to be considered
- Cal Grant A and B
- Competitive awards only



Grade Point Averages (GPAs)

- GPAs are submitted by high schools and colleges
 - High School GPA
 - Reestablished Community College GPA
 - College GPA
- SAT, ACT, GED, TASC, HiSET allowed if:
 - student does not have a GPA
 - coursework cannot be converted to a 4.00
 - attended a non-accredited high school





CA Education Code 69432.9

- Mandates all high schools (**public and charter**) to upload GPAs for all enrolled seniors by October 1
- Provide students/parents opt-out option no later than January 1 of junior year





High School GPAs

- Use grades from *sophomore year and junior year for current seniors*
- Use grades from *sophomore to senior year for prior year graduates*
- DO NOT include grades from P.E., ROTC, or remedial courses (as defined by the school)
- Failing grades not retaken must be included
- Calculate the GPAs on unweighted 4.00 scale





Re-Established GPAs

- Student has at least 16 units but no more than 23 units at a California Community College
- Student will only qualify for Competitive Cal Grant B





College GPAs

- College GPAs are calculated based on completed units
 - 24 or more semester
 - 36 or more quarter





General Eligibility Requirements

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Basic Eligibility Requirements

Federal Requirements and Additional Cal Grant Requirements

*U.S. Citizen, Eligible
Non-Citizen

Meets Selective
Service

*Social Security
Number

Maintain
Satisfactory
Academic Progress

Not Earned a
Bachelor's
Degree

Not Incarcerated

Attend Cal Grant
Eligible College

GPA

*** Requirements are
supplanted by other
eligibility criteria for AB 540
students**

*California Resident

Not in Default on
Title IV Student
Loan

Enrolled at Least
Half-Time

Not owe a refund of
any Title IV grant or
state grant

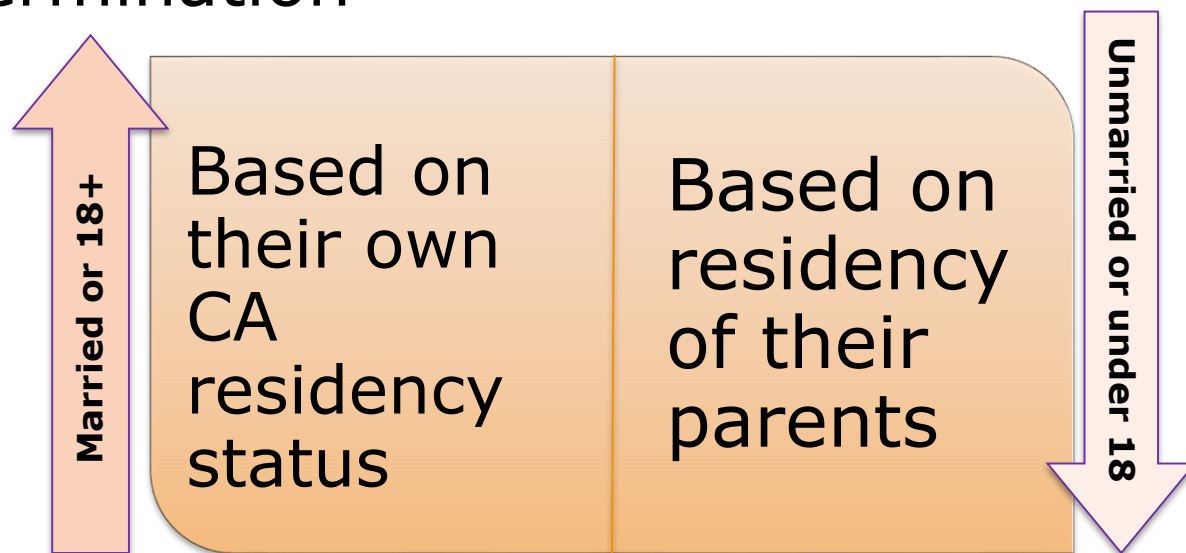
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Establishing Residency

California Residency

- CSAC makes initial determination based on FAFSA/CADAA
- Institutions make final residency determination



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Citizenship Requirements

- Must be a U.S citizen
- Eligible non-citizen
 - ❑ **U.S Permanent Resident (I-551)**
 - ❑ **Conditional Permanent Resident (I-551C)**
 - ❑ **USCIS Arrival-Departure Record (I-94)**
 - ✓ "Refugee"
 - ✓ "Asylum-Granted"
 - ✓ "Cuban-Haitian Entrant"
 - ✓ Battered Immigrant-
Qualified Alien
 - ✓ Victims of human trafficking
 - ✓ T-Visa holder
 - ✓ U-Visa holder
 - ✓ "Parolee" for at least 1 year with
intent to become U.S
citizen/Permanent Resident



Incarcerated Students

- Not eligible for Cal Grant benefits
- Can apply for Cal Grant if they will be able to accept award upon release
- Not considered incarcerated if:
 - ❑ **In a half-way house**
 - ❑ **While on home detention**
 - ❑ **Sentenced to serve only weekends**



Defaults/Overpayments

To be eligible for a Cal Grant, a student must:

- ☐ Not be in default on a Title IV student loan
- ☐ Not owe a Title IV or state grant overpayment

To regain eligibility, a student must:

- ☐ Contact their financial aid office for additional information
- ☐ Repay full amount or be making acceptable payments



Satisfactory Academic Progress

- Maintain SAP as defined by your school in accordance with federal requirements
- General standards
 - ❑ Maintain 2.0 GPA (cumulative)
 - ❑ Complete a minimum of 67% of attempted units per academic year
 - ❑ Not exceed 150% of the published program length
- Schools must check SAP before disbursing funds



Bachelor/Degree Holders


- Bachelor degree holders not eligible
 - ❑ **Includes: Bachelor degree holders from foreign or unaccredited schools**
- Exception
 - ❑ **Teaching Credential Programs**
 - ❑ **Mandatory 5 Year Programs**

Dream Act Eligibility

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The CA Dream Act

- In 2001 AB 540 passed
- The CA Dream Act was authored by Assembly Member Gil Cedillo 
- In 2011, AB 130 and AB 131 became law
 - AB 130 allows privately funded scholarships offered through public institutions
 - AB 131 allows state-funded financial aid

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Assembly Bill (AB) 540

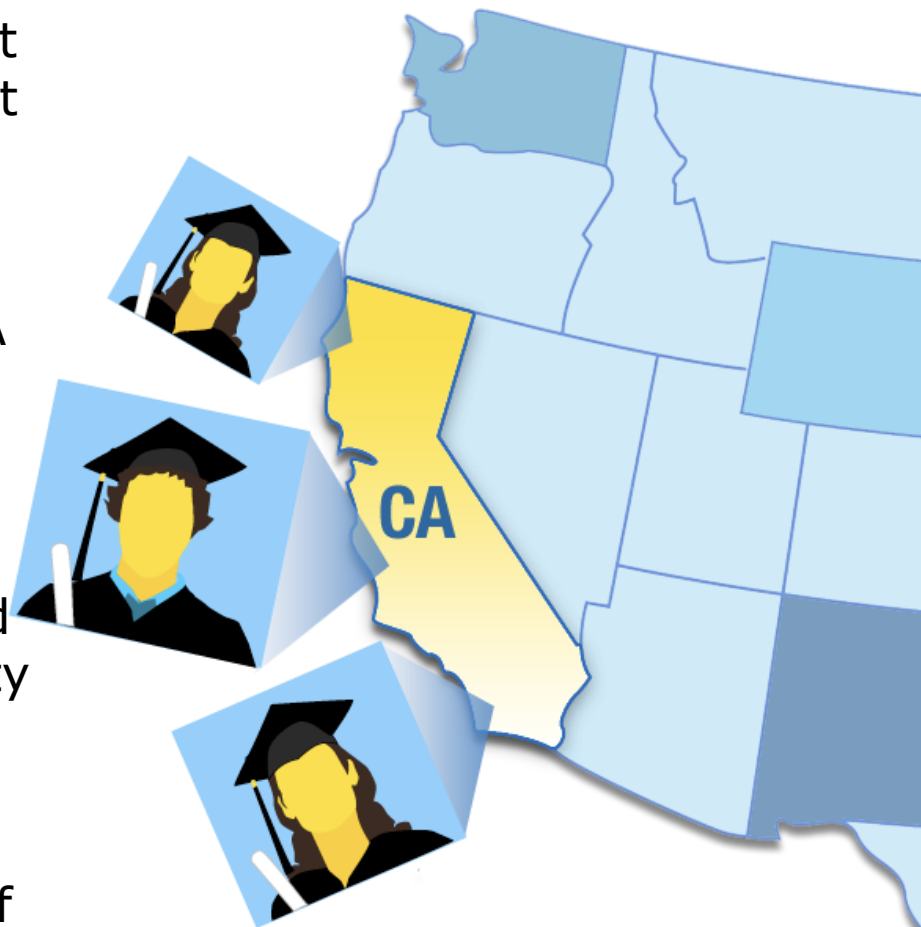
- Allows eligible students, including undocumented students, **to pay in-state tuition**
- Determination for AB 540 eligibility is a campus responsibility



AB 540 Requirements

- ✓ Attended a CA high school for at least three years or attained the equivalent of at least three years of credits*,
AND
- ✓ Graduated or will graduate from a CA high school or passed the Certificate of General Education Development (GED), **AND**
- ✓ Will register or enroll in an accredited and qualifying CA college or university

*Under this provision, you could also have attended CA schools (elementary and secondary) for a cumulative total of three or more years (AB 2000).



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Additional Undocumented Requirements

- If applicable, complete(d) an affidavit to legalize immigration status as soon as you are eligible, **AND**
- Do not hold a valid non-immigrant visa (F, J, H, L, A, B, C, D, E, etc.)**

**If a student have Temporary Protective Status or hold a U Visa, you should apply with the CA Dream Act Application.



Deferred Action for Childhood Arrivals (DACA)

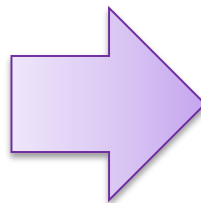
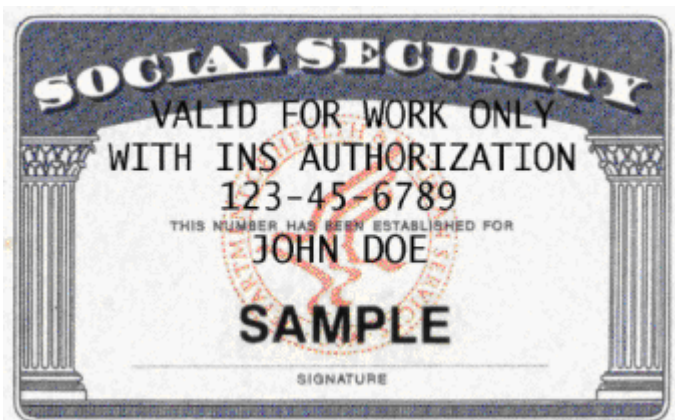
- DACA is a federal program that protects young undocumented applicants from deportation
- DACA issues SSN cards valid for work only
- The DACA program has specific criteria applicants must meet



<http://www.uscis.gov/humanitarian/consideration-deferred-action-childhood-arrivals-process/frequently-asked-questions>



DACA Social Security Card



- ✓ Can be used to work in the U.S.
- ✓ Can be used (but is not required) on Dream Act Application
- ✓ **Not** to be used to upload a GPA
- ✓ **Not** to be used to complete a FAFSA in California





Selective Service

- Males between ages 18-25 must register for Selective Service
- Do **not** need a SSN to register
- Answer register on CADAA



Registering for Selective Service is a *requirement* to receive financial aid.

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Institution Verification 2015 Taxes

Verification for IRS Tax Filers

- Applicant can obtain an IRS transcript (Form 4506-T)
- *New:* Applicant can provide a signed paper copy of the 2015 IRS Tax return

**Institutions have the flexibility to choose which documents to accept as part of the verification process.*

Verification of Non-filing

- Applicant to provide signed statement certifying the individual has not filed a 2015 tax return and is not required to while listing all income earned; and
- A copy of IRS Form W-2, or an equivalent, for each source of income received

**Institutions are no longer required to collect IRS documents to verify the non-filing status.*



Verification

- 20% of students are selected for verification
 - Use the federal V1 verification criteria
- Students must meet AB 540 criteria
 - Affidavit to be maintained at the institution for all undocumented students
- Selective Service registration for males 18-25
- Students and parents residing in the United States file US tax returns, if meet earning threshold

Cycles and Types

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Cycles

Entitlement Cal Grant A and B

- Unlimited awards
- For High school and transfer

Competitive Cal Grant A and B

- 25,750 total awards
 - 12,875 awards for March 2 deadline (all schools)
 - 12,875 awards for Sept 2 deadline (community college)

Competitive Cal Grant C

- 7,761 total awards



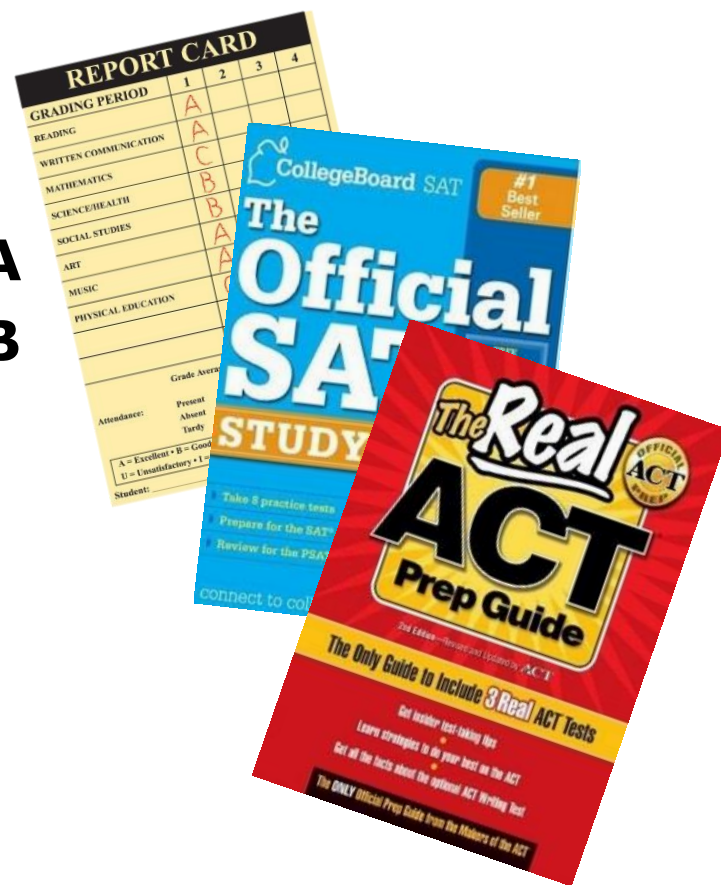
Entitlement Cycle

- Guaranteed for students who meet program requirements
- 2 entitlement programs
 - ❑ **High School Entitlement program**
 - ❑ **Transfer Entitlement program**
- Receive either Cal Grant A or Cal Grant B
- Deadline: March 2nd
 - ❑ **FAFSA/CADAA + GPA**



High School Entitlement Cycle

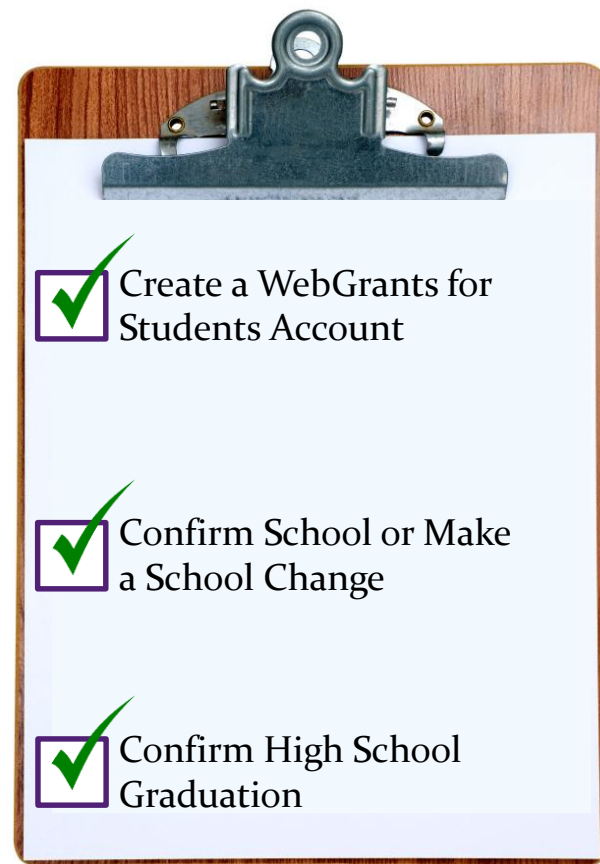
- Current high school seniors or prior year high school graduates
- GPA requirements
 - ❑ **3.00 H.S GPA – Cal Grant A**
 - ❑ **2.00 H.S GPA – Cal Grant B**
- If no GPA, use Test Score
 - ❑ **SAT**
 - ❑ **ACT**
 - ❑ **GED**
 - ❑ **TASC**
 - ❑ **HiSet**





Claiming the Cal Grant Award

- High school students must claim their award in WebGrants for Students by:
 - Confirming their school of attendance
 - Confirming their high school graduation





Transfer Entitlement Cycle

- For Community College students transferring to a baccalaureate degree granting institution (BDGI) during academic year
- Student must be listed on prior year CCC enrollment file
- Under the age of 28 by December 31 of the application year
- 2.40 Community College GPA
 - ❑ Based on at least 24 semester units



Transfer Entitlement Cycle

Graduated from a CA high school (or equivalent) **and** must have been a CA resident at the time of graduation

OR

Didn't graduate from H.S (or equivalent) **but** was a CA resident at age 18*

*Beginning with 2017-18 AY



Transfer Entitlement (E2)

2016-17 CCC		2017-18 BDGI	
Fall	Spring	Fall	Spring
✗	✗	✗	
✗			✗



2015-16		2016-17		2017-18	
Fall	Spring	Fall	Spring	Fall	Spring
UCB	UCB	CCC	CCC	UCD	UCD



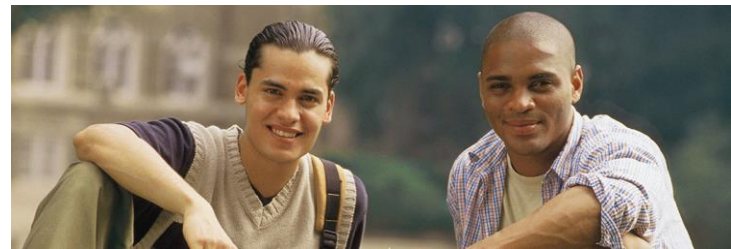
2015-16		2016-17		2017-18	
Fall	Spring	Fall	Spring	Fall	Spring
UCB	UCB	CCC	CCC	UCB	UCB





Competitive Cycle

- Students who do not meet Entitlement criteria
- Cal Grant A, B, and C
- GPA must be submitted for Cal Grant A, B
- FAFSA filers have priority
- Limited to 25,750 paid awards per year
 - 12,875 for March 2 Deadline
 - 12,875 for Sept 2 Deadline
 - Only for CCC students
- Scoring criteria used to rank and award students





Competitive Scoring Matrix

- New 2016-17 scoring matrix benefits many more students living in poverty, recipients of means-tested benefits, single parents, homeless, and foster youth
- Changes include:
 - GPA
 - EFC
 - Disadvantaged/Socioeconomic Indicators



Competitive Recycle

- Recycle Awards
 - Awards for unpaid students will be withdrawn in order to offer additional awards to the next cohort of eligible students
 - Ensure the maximum utilization of awards
 - To increase paid rate



Cal Grant A

- Minimum 3.0 HS GPA / 2.4 College GPA
- At least 2 academic years in length leading to an Associate's or Bachelor's programs only
- 2016-17 Award amounts

CSU	UC	Independent*	For Profit^
\$ 5,472/yr	\$ 12,294/yr	\$ 9,084/yr	\$4,000/yr

* Private non-profit institutions and WASC accredited for-profit institutions

^ Non-WASC accredited for-profit institutions

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Community College Reserve

- Automatic two years
 - students can request a third year
- Complete and submit the Recipient Change Form to reflect change of schools
- Will be processed like a renewal



Cal Grant B

- Minimum 2.0 HS GPA / 2.4 College GPA
- At least 1 academic year in length leading to an Associate's, Bachelor's or Certificate degree
- Award amounts
 - ❑ **Base Access (1st year):**
 - ❑ **1,648 + Tax credit**
 - ❑ **Tuition and Fees (Subsequent years):**
 - ❑ **Cal Grant A award amount**



Cal Grant B

- Top 2%
 - Allows limited high school entitlement students to receive T/F in their 1st year
 - Students are scored using a disadvantage scoring criteria



Cal Grant C

- No GPA requirement
- Competitive Awards
 - ❑ **7,761 annual awards**
 - ❑ **Applicants are scored**
- Associate's and Certificate programs
 - ❑ **At least 4 months in length**
- Award amounts
 - ❑ **Independent / Vocational schools**
 - ✓ **\$2,462 (tuition and fees)**
 - ✓ **\$547 (books and supplies)**
 - ❑ **Community Colleges**
 - ✓ **\$547 (books and supplies)**

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Cal Grant C

- Two of the following must be met:
 - High employer need or demand
 - High employment growth or industry cluster
 - High employment salary and wage projections
 - Economic security
- Special consideration to long-term unemployed



Which Cal Grant is Best?

- Students can be eligible for multiple types (Cal Grant A or B), but awarded most beneficial
- Only one Cal Grant award at a time
- Recipients can change award type but only before it is paid



Fifth Year Benefits

- Enrolled in an approved mandatory five-year undergraduate program
- Student must already be a Cal Grant recipient
- Must have financial need
- Must submit a request for *fifth year benefits form (G-42)*



Teaching Credential Program

- Enrolled in a teaching credential program
- Paid as a Cal Grant recipient
- Completed all requirements for a BA/BS
- Enrolled in a CA Commission on Teacher Credentialing approved institution and an eligible Cal Grant institution
- Submit *Teaching Credential Program Benefits (G-44) Form*



Students Are Renewed if...

- They have at least 10% remaining eligibility
- All terms must be satisfied with a payment transaction
- Current FAFSA/CADAA on file
 - Filed before year end reconciliation
- Meet financial requirements



Renewal Exception

- Any recipient who was ineligible for a renewal award during the prior year:
 - exceeded the income and asset ceilings
 - did not demonstrate financial need
- Will be eligible to receive a renewal award if:
 - all eligibility requirements for renewal are met
 - has remaining program award eligibility

**The program eligibility will be reduced by one full-time equivalent academic year.*



What If...?

- Year 1
 - E1 awarded Cal Grant A (400% lifetime eligibility)
 - Student paid full time for all terms
- Year 2
 - E1 Ineligible Renewal
 - Income over ceiling for Cal Grant A
 - 100% eligibility used
- Year 3
 - E1 Eligible Renewal
 - Meet financial requirements for Cal Grant A
 - Renewed with reduced lifetime eligibility (Now 200%)

Award Sequence

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Step 1: Entitlement or Competitive Filter

- Is it an Entitlement Application?
 - Based on High School Grad Date taken from the GPA Verification
- Is it a Transfer Entitlement?
 - High School Grad Date, if known
 - Age Proxy
 - Baccalaureate Degree Granting Institution?
 - CCC Enrollment file
 - CCC GPA



Step 2: Validation

- CSAC matches the FAFSA record with the GPA data using the Social Security number
- Records are checked to see if they match any that are already on the system
- ISIR records that cannot be matched to a GPA are set aside
 - No Cal Grant A or B consideration
 - Possible Cal Grant C
- If no GPA, system will check for a test score



Step 3: Non-Financial Edits

- Common Edits (for all applicants)
 - California residency
 - California residency at time of HS graduation (Entitlement applicants only)
 - Eligible California School listed
 - No bachelor's degree received
 - Education level < 5



Step 3: Non-Financial Edits

- Program Edits
 - Eligible school (for specific program)
 - GPA
 - Degree objective (for Cal Grant C)

Step 4: Financial Edits

- Income Ceilings
- Asset Ceilings
- Financial Need
- Minimum Need not Met



Income Ceilings

2017-18 CAL GRANT PROGRAM INCOME CEILINGS		
	Cal Grant A and C	Cal Grant B
Dependent students and Independent students with dependents other than a spouse		
<u>Family size:</u>		
Six or more	\$110,300	\$60,600
Five	\$102,200	\$56,100
Four	\$95,400	\$50,100
Three	\$87,800	\$45,100
Two	\$85,700	\$40,000
Independent students		
Single, no dependents	\$35,000	\$35,000
Married, no other dependents	\$40,000	\$40,000

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Income: Who and How?

- Who's Income?
 - For dependent students - only parents income is used
 - For independent students - only student's (and spouse's) income is used.
- How is it calculated?
 - Figure received directly from a sub-calculation on the ISIR called the "Total Income"
 - $\text{AGI} + \text{Untaxed Income} - \text{Exemptions to Income} = \text{TOTAL INCOME}$



Asset Ceiling

2017-18 CAL GRANT PROGRAM ASSET CEILINGS	
Dependent students ¹	\$73,800
Independent students	\$35,100

¹ This ceiling also applies to independent students with dependents other than a spouse.



Assets: Which and How?

- Asset total is the sum of:
 - 100% of reported cash, savings and checking accounts
 - 100% of net worth of investments, including real estate
 - Approximately 40% of business and farm assets per the amount from federal EFC formula tables A4 & B3
- The Asset figure is taken from a sub-calculation on the ISIR called the “Net Worth.”



Business and Farm Net Worth

**Table A4: Business/Farm Net Worth Adjustment
for EFC Formula A Worksheet (parents only)**

If the net worth of a business or farm is—	Then the adjusted net worth is
Less than \$1	—\$0
\$1 to \$130,000	40% of net worth of business/farm
\$130,001 to \$385,000	\$52,000 + 50% of net worth over \$130,000
\$385,001 to \$640,000	\$179,500 + 60% of net worth over \$385,000
\$640,001 or more	\$332,500 + 100% of net worth over \$640,000



Let's Think!

1. Family of five, AGI of \$59,000, and minor student's parent had \$20,000 per year in non-taxable disability income. Assuming all other eligibility, does this student qualify for a Cal Grant?

Cal Grant A Eligible



Let's Think!

1. Dependent student with a family of 4 owns a business worth \$110,000. What is their adjusted net worth? Assuming all other eligibility, does this student qualify for a Cal Grant?

\$44,000; Yes



Financial Need Requirement

Financial Need Calculation:

$$\begin{array}{r} \text{Cost of Attendance (COA)} \\ - \text{Expected Family Contribution} \\ \hline \text{Unmet Financial Need} \end{array}$$

Cal Grant A

Must have a minimum financial need of at least the maximum Cal Grant A award amount + \$1,500

Cal Grant B

Must have a minimum financial need of at least \$700

Cal Grant C

Must have a minimum financial need of at least the maximum Cal Grant C award amount + \$1,500



Minimum Need Requirements (New Cal Grant awards)

- For 2016-17 New Cal Grant A & C
 - $\text{CSU} = \$5,472 + \$1,500 = \$6,972$
 - $\text{UC} = \$12,294 + \$1,500 = \$13,794$
 - $\text{Private Non Profit/WASC For Profit} = \$9,084 + \$1,500 = \$10,584$
- New Cal Grant B
 - Minimum need of \$700 required



Step 5: Ineligible Notifications

- Student notifications:
 - Entitlement: "Application Disqualification" letter
 - Student or school may make corrections on FAFSA/CADAA
- School access:
 - View reason(s) on WebGrants Student Award Summary screen in the "P/E Reason" column.
 - WebGrants will display reject code



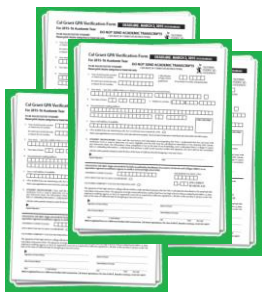
Step 6: Entitlement Selection

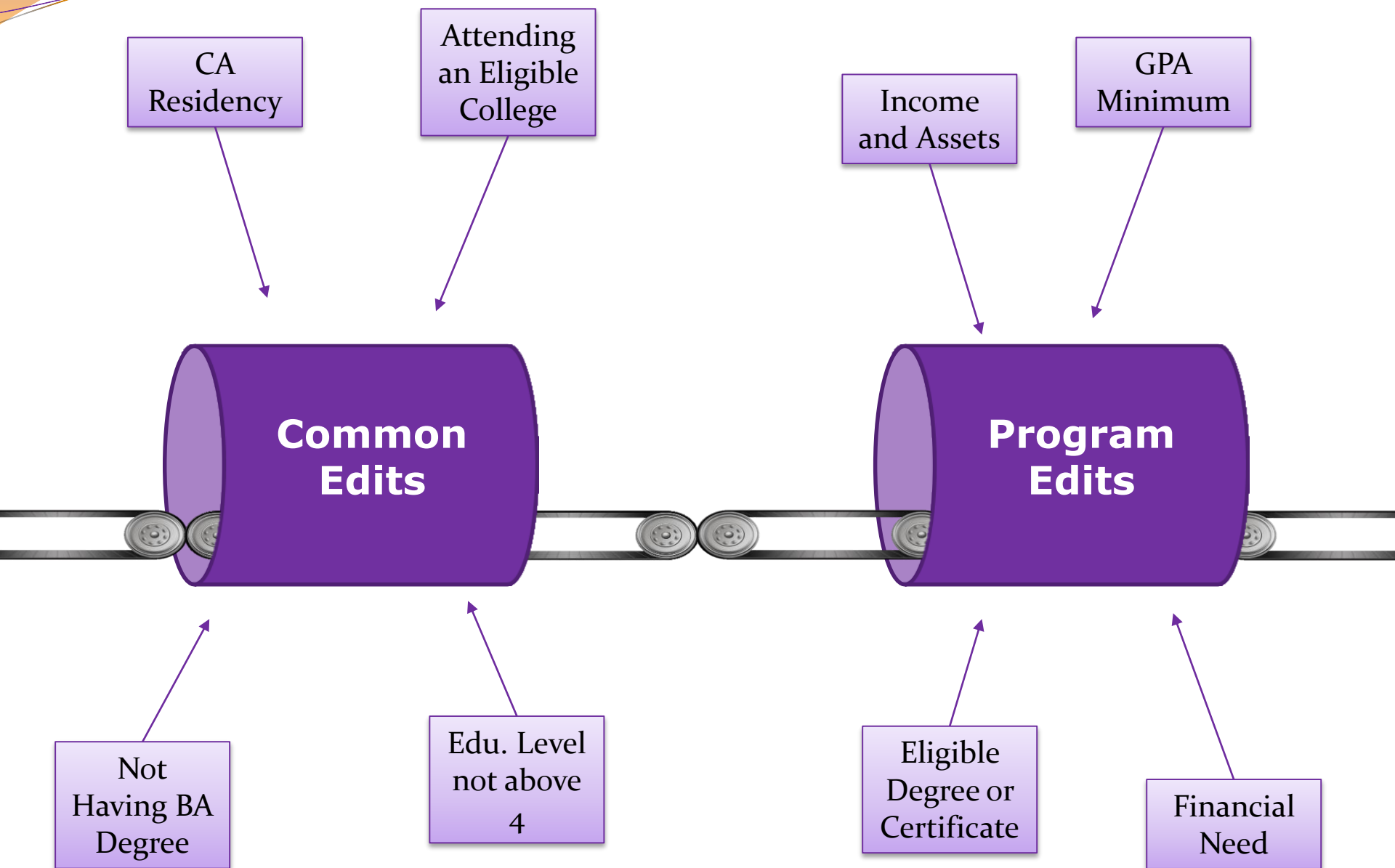
- All on-time applicants meeting the Entitlement selection criteria can be offered an award.
- Placed in Cal Grant A or B based on their GPA and income.
- Eligible for both?
 - Awarded program most beneficial at listed school
 - Prior to payment during first year, students may switch with consent from their school Financial Aid Office.



Step 7: Competitive Scoring and Selection

- Competitive applicants are scored based on disadvantaged indicators.
- Only those scoring highest receive an award.
- Placed in Cal Grant A or B based on their GPA and income.
- Eligible for both?
 - Awarded program most beneficial at listed school
 - Prior to payment during first year, students may switch with consent from their school FAO.





After Passing All Edits

E1 & E2 Students are placed on Hold until they complete the necessary certification form (G6 or G8)

C1 & C2 students are thrown into a pool of other students, which will wait to be scored in our awarding competition



**E1 & E2
Holding
Tank**

**C1 & C2
Competitive
Pool**

**E1 & E2
Holding
Tank**

Once Holds Are Released



**C1 & C2
Competitive
Pool**

Once Competitive Pool is Scored



Corrections for Awarded Students

- Examples:
 - Income and asset verification reveals student is not eligible for Cal Grant
 - Financial need changes
 - High school graduation date not in Entitlement range
 - Other basic eligibility requirements
- Use Grant Record Change Form (G-21)



Corrections for Unawarded Students

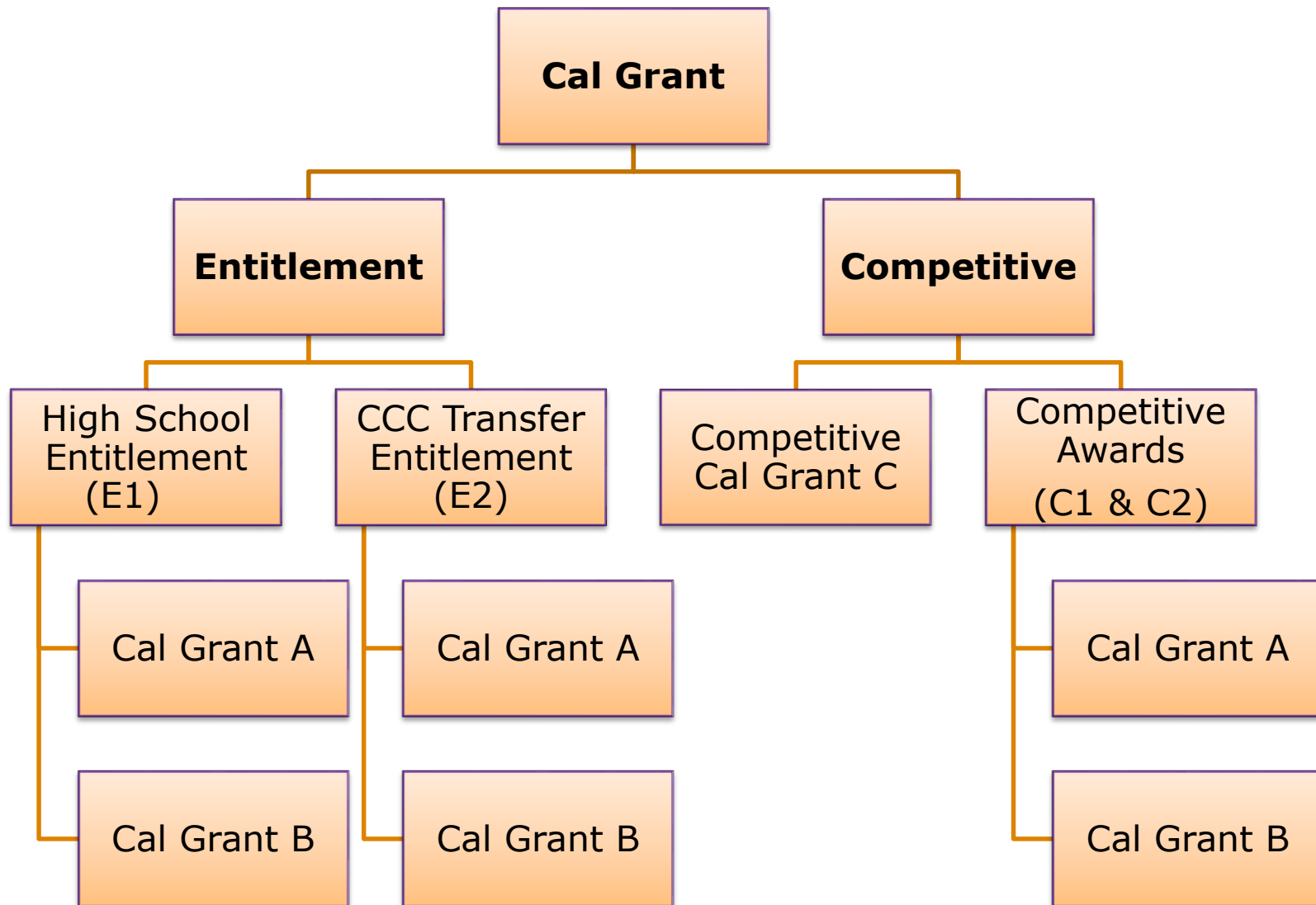
- Entitlement applicants
 - Received through June 30 of the award year
 - Can correct any field that might change their eligibility
 - No EFC
 - Application “on hold”
 - Financially Ineligible
- Competitive applicants
 - No corrections after award selection - period!

Let's Review

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Cal Grant Programs





Awarding Cycle Timeline

October
2016

- October 1: 2017-18 application period opens

November

- First E1 award cycle is run

March
2017

- March 2 deadline
- E2 award cycle is run
- G6 forms sent to potentially eligible students

April

- C1 award cycle is run
- Cal Grant C cycle runs
- Cal C supplements sent to potentially eligible students

May

- Top 2%

June/ July

- Renewal cycle is run
- Renewal runs continue weekly until September

September

- September 2 deadline
- C2 award cycle is run

California Student Aid Commission

**Navigating
WebGrants**



Your WebGrants Account

Making education beyond high school financially accessible to all Californians.



Getting Starting



Complete and submit:

- WebGrants System Administrator's Access Request Form or User Access Request Form
- Information Security and Confidentiality Agreement
- Complete the Information Security Training



Your WebGrants Account

Please contact your School's System Administrator if you need access to additional screens.

Portal Menu

[WebGrants](#)

[Table Edit](#)

[User Administration](#)

[CA Dream Act](#)

[SB 70](#)

Account Information

[View Your Account Details](#)

[Help With Your Account](#)



Your Account Details

- Keep your personal info up-to-date (phone number, email address)
- Change your password if necessary.
- View who (at your campus) is your System Administrator(s)

[Back to Home Page](#)

Account Summary for Justin Watkins[Help With Your Account](#)

Sign-in Info
User Name:SA3JXW
[Change your password](#)
E-mail Address:jwatkins@csac.ca.gov
Change your E-Mail Address:

Sign-out
You may wish to sign-out from your account when you leave a public computer. [Click here to sign-out.](#)

Screen Access List

Enrollment - read	}
Upload Enrollment - write	
File Upload Status - write	
Add Enrollment - write	
Delete/View Enrollment - write	
Enrollment Data Inquiry - Details - read	
Enrollment Data Inquiry - Load Summary - read	

Contact Info
Current contact info:
Justin Watkins
10834 International Drive Ste #100
Rancho Cordova CA 95670
Day Phone: 9164646425 **Ext**
Change your phone number: **Ext**
Fax Number:
School Access List
99999999 - CSAC HS GPA SECURITY
School Administrators

Name	School ID	Phone Number
------	-----------	--------------



If You Are The System Administrator...

- You have access to create/change WebGrants User Accounts for your campus

Please contact your School's System Administrator if you need access to additional screens.

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User Administration

User Administration Menu

[Add New Users](#)

[Edit Existing Users](#)

[User Access Report](#)



Adding a New User

- User ID must be unique
- All fields marked with (*) are required
- Access cannot exceed 1 calendar year

UserID/Password	
User ID *	<input type="text"/>
Password *	<input type="password"/>
<small>Six-character minimum; no spaces</small>	
Retype Password *	<input type="password"/>

Contact Information	
First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Title	<input type="text"/>
Address 1 *	<input type="text"/>
Address 2	<input type="text"/>
City *	<input type="text"/>
State *	<input type="text"/>
Zip Code *	<input type="text"/>
Email Address *	<input type="text"/>
ReType Email Address *	<input type="text"/>
Phone Number *	<input type="text"/> <input type="text"/> <input type="text"/> Ext <input type="text"/>
Fax Number	<input type="text"/>
Security Training Received Date	<input type="text"/>
<small>Date Format: mm/dd/yyyy example: 02/18/2002</small>	

User Roles	
User Role *	<input type="text"/>
Screen Templates	<input type="text"/>
Effective Start Date *	03/18/2014
Effective End Date *	<input type="text"/>
<small>Date Format: mm/dd/yyyy example: 02/18/2002</small>	

Add New User



Adding a New User

- Assign access to specific WebGrants screens depending on what the User will be doing
- For Example, a User from your fiscal office may only need access to 'Report Download', and the Reconciliation screens.

Screen Access				
Screen Name	Access Permissions			
Enrollment				
GPA				
Student Info				
<i>Award Summary</i>	<input type="radio"/> None	<input checked="" type="radio"/> Read	<input type="radio"/> Write	<input type="radio"/> Grant
<i>Award Detail</i>	<input type="radio"/> None	<input checked="" type="radio"/> Read	<input type="radio"/> Write	<input type="radio"/> Grant
<i>Student History</i>	<input type="radio"/> None	<input checked="" type="radio"/> Read	<input type="radio"/> Write	<input type="radio"/> Grant
<i>CA Aid Report</i>	<input type="radio"/> None	<input checked="" type="radio"/> Read	<input type="radio"/> Write	<input type="radio"/> Grant
<i>Grant Record Changes</i>	<input type="radio"/> None	<input type="radio"/> Read	<input checked="" type="radio"/> Write	<input type="radio"/> Grant
<i>Simulator</i>	<input type="radio"/> None	<input type="radio"/> Read	<input checked="" type="radio"/> Write	<input type="radio"/> Grant
School Info				
Roster/Reconciliation				
<i>Customize Roster</i>	<input type="radio"/> None	<input type="radio"/> Read	<input checked="" type="radio"/> Write	<input type="radio"/> Grant
<i>Display Roster</i>	<input type="radio"/> None	<input checked="" type="radio"/> Read	<input type="radio"/> Write	<input type="radio"/> Grant
<i>Print Roster</i>	<input type="radio"/> None	<input checked="" type="radio"/> Read	<input type="radio"/> Write	<input type="radio"/> Grant
<i>Display Accept / Reject Report</i>	<input type="radio"/> None	<input checked="" type="radio"/> Read	<input type="radio"/> Write	<input type="radio"/> Grant
Data Transfer				
Chafee Grant				
Accounting				
California National Guard				
<i>EAAP Roster</i>	<input type="radio"/> None	<input type="radio"/> Read	<input checked="" type="radio"/> Write	<input type="radio"/> Grant
<i>EAAP Payment</i>	<input type="radio"/> None	<input type="radio"/> Read	<input checked="" type="radio"/> Write	<input type="radio"/> Grant
CA Dream Act				
NON-SSN GPA				
SB 70				

Save Changes to CSAC



WebGrants User Access Report

- View all active or inactive accounts for your campus
- See when each User account will expire (End Date)

California Student Aid Commission
Web Grants User Access for
CSAC

Active Users Report

Number of Records: 73
Print Date: 3/18/2014 9:00:53 AM

Rec #	Name	User ID	Start Date	End Date
1	Ofelia	SA0000	11/21/2002	11/21/2016
2	Cheryl	SA0000	6/24/2013	6/24/2016
3	Shaunda	SA0000	11/3/2010	8/8/2014
4	Monique	SA0000	9/26/2013	9/26/2014
5	Tabitha	SA0000	8/5/2009	8/8/2015
6	LeAnn	SA0000	12/4/2013	12/4/2014
7	Justin	SA0000	1/25/2007	1/22/2015

School Info Screens

Making education beyond high school financially accessible to all Californians.



School Info Menu

School Info Menu

[Demographics](#)

[Contact Information](#)

[Cost Estimate](#)

[Search](#)



Institution Demographics

School ID = 00123200 **GO!**

Address 1: * RIVERSIDE CITY COLLEGE

Address 2: 4800 MAGNOLIA AVE.

City: RIVERSIDE

State: CA **Zip:** 92506 - 1299

Contract Date: 09/01/1978

Phone: (951) 222 - 8000

Source of Change: CSAC

Comments:

Segment 02 - COMMUNITY COLLEGE

School Inactive Flag: ☐

Submit Changes **Reset**

Previous Data

Previous Data	Source of Change	Change Date	Comments
RIVERSIDE COMMUNITY COLLEGE * 4800 MAGNOLIA AVE. RIVERSIDE, CA 92506-1299 (951)222-8000	CSAC	02-JUN-11	
RIVERSIDE COMMUNITY COLLEGE * 4800 MAGNOLIA AVE. RIVERSIDE, CA 92506-1299 (951)222-8700	CSAC	28-JUL-05	
RIVERSIDE COMMUNITY COLLEGE * 4800 MAGNOLIA AVE. RIVERSIDE, CA 92506-1299 (909)222-8700	CSAC	28-JUL-05	
RIVERSIDE CITY COLLEGE * 4800 MAGNOLIA AVE. RIVERSIDE, CA 92506-1299 (909)222-8700		10-NOV-03	



Contact Information

CHAFEE PROGRAM COORDINATOR

EditDelete

* *

OFFICE OF FINANCIAL AID
800 S. COLLEGE DR.
SANTA MARIA, CA 93454 – 6399

DIR, ADMISSIONS AND RECORDS
Phone: 805 – 922 – 6966
E-Mail:

Comment:
Last Changed By: **SA01**

Change Date: **09/19/2011**

History

CHAFEE PROGRAM COORDINATOR

First Name*:

Middle Initial:

Last Name*:

Title*: CHAFEE PROGRAM COORDINATOR

Address 1*: OFFICE OF FINANCIAL AID

Address 2: 800 S. COLLEGE DR.

City*: SANTA MARIA

State*: CA Zip Code*: 93454 – 6399

Comments:

Phone*: 805 – 922 – 6966

E-Mail*:

Maximum of 500 Characters allowed. Current count:

SaveCancel

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Cost Estimate

		2017-2018	2016-2017
Title IV School ID#		001313	001313
Program/Course Length			
#of Months/Clock Hours/Credit Hours		Months ▼	
Required Attendance During Academic Year			
Number of Terms Per Year		3 Quarters ▼	3 Quarters
Term Start Dates			
Fall		09/21/2015	09/21/2015
Winter		01/04/2016	01/04/2016
Spring		03/24/2016	03/24/2016
Summer		06/20/2016	06/20/2016
Enter 9-Month Budgets for the Following Costs			
Tuition			
Amount		\$0	\$0
Fees			
Fee Type/Amount		\$	
Fee Type/Amount		\$	
Fee Type/Amount		\$	
Fee Type/Amount		\$	
Total Amount	Delete Fees	\$12804	\$12,804

Student Info Screens

Making education beyond high school financially accessible to all Californians.



Award Summary

- Displays history of a Cal Grant application for individual students
- Hover mouse over many of the fields to see more detail

Student Award Summary

- All data columns can be sorted either ascending or descending order.
- Click on the blue column headings to change the sort order of the data.
- Additional information can be viewed by moving your mouse over certain data fields.

Search = SSN

Home Phone:
Cell Phone:
E-Mail:

SSN:
CSAC ID:
Grant ID:
Date of Birth:
WGS Account: Active
Third Party Access: NONE
Selective Service Status:
School Confirmed: No

Academic Year ▼	Program Name	Application Status	Award Status	Award Status Date	Award Amount	Cycle ID	School ID	P/E Reason	C/E Reason	CC Reserve
2016-2017	B	COMM WTH	COMM WTH	04/19/2017	\$13,964	E2	00131300	30		N
2015-2016	A	F-E CMPL	COMM WTH	11/25/2015	\$12,240	E2	00131300	88		N
2015-2016	B	F-E CMPL	AUTO ACC	07/27/2015	\$13,896	E2	00131300			N
2014-2015	A	F-E CMPL	DENY LOW	10/06/2014	\$12,192	C2	00123200			Y
2014-2015	B	F-E CMPL	DENY LOW	10/06/2014	\$1,648	C2	00123200			Y
2013-2014	A	F-E CMPL	DENY LOW	09/30/2013	\$12,192	C2	00123200			Y
2013-2014	B	F-E CMPL	DENY LOW	09/30/2013	\$1,473	C2	00123200			Y



Student Award Detail

- Information listed on the FAFSA or Dream Act
- View details of award or disqualification by Academic Year
- Shows Cal A & B Scores

Student Award Detail			
<p>Both new and renewal students can be viewed.</p> <p>Only award types with data will be displayed.</p>			
<p>Search = <input type="text" value="SSN"/> <input type="text"/> Acad Year = <input type="text" value="2017-2018"/> <input type="button" value="GO"/></p>			
<p>GRIFFIN</p> <p>Application Status: FIN ELIGIBILITY COMPLETE Cycle ID: C1 SSN:</p> <p>Dependency Status: DEPENDENT Parents' Marital Status: MARRIED CSAC ID:</p> <p>Parents' Total Income: \$21,948 Parents' Family Size: 3 Grant ID:</p> <p>Parents' Net Worth: \$0 Family in College: 1 Education Level (EL): 1</p> <p>Registered Domestic Partner: No ISIR Ref: 02 Date: 03/01/2017 EL Verification: VERIFICATION REQUIRED</p> <p>Year Entered Program: 2017</p>			
NEW			
	Cal Grant A	Cal Grant B	Cal Grant C
School ID/Program Code	00730400 00	00730400 00	00730400 00
Segment	PR 4Y GR	PR 4Y GR	PR 4Y GR
Semester/Quarter	SEMESTER	SEMESTER	SEMESTER
Score		429	
Score Detail	CAL A SCORES	CAL B SCORES	CAL C SCORES
GPA/Type	0.00 / Reestablished GPA	2.50 / RE-ESTAB	0.00 / Reestablished GPA
Attendance Status	FULL	FULL	FULL
Housing Code	1 - CAMPUS	1 - CAMPUS	1 - CAMPUS
Remaining Program Eligibility	400.00%	400.00%	200.00%
Award Status	PROGRAM EDIT DISQUAL	SCORE BELOW CUTOFF	FINANCIALLY ELIGIBLE
Budget Amount/Duration	\$0 / 12	\$45,490 / 12	\$45,490 / 12
Expected Family Contribution (EFC)	\$965	\$965	\$965
Other Aid	\$0	\$0	\$0
Veterans Benefits	\$0	\$0	\$0
Unmet Need			\$44,525
Total Award Amount	\$0	\$2,505	\$4,513
Tuition/Fees	\$0	\$0	\$3,693
Access/Books&Supplies	\$0	\$2,505	\$820



Student History

- Each term payment ever reported
- Dollar amounts
- Amount of eligibility used for each payment
- Remaining eligibility

Student History														
<p> Academic year selection will display all payments prior to and including the year selected. Data can be sorted by Academic Year, Term or Date. Click on the blue column headings to change the sort order of the data. </p>														
<p> Search = <input type="text" value="SSN"/> <input type="text"/> Acad Year = <input type="text" value="2016-2017"/> Txn Type = <input type="text" value="Pending"/> <input type="button" value="GO!"/> </p>														
<p> KELSIE SSN: _____ Cycle ID: E2 TANF Eligible: Y CSAC ID: _____ Program Code: B Remaining Eligibility: .02 Grant ID: _____ TCP/5yr: _____ Award Status: 70 Remaining LOA Balance: 200 Remaining LH Balance: 100 </p>														
PG	AW	School Id	Acad Yr	Term	Leap/Sleap	TANF Paid	Pay Amt	Pay Stat	Elig Used	Adj Amt	Adj Rsn	Date	Rec Type	Created By
B	T/F	00131300	2016	FL		Y	4,098	RP	33.33			09/23/2016	PAY	
B	ACCS	00131300	2016	FL				RA	33.33	556	FT	09/23/2016	PAY	
B	T/F	00131300	2016	WN		Y	4,098	RP	33.33			01/06/2017	PAY	
B	ACCS	00131300	2016	WN				RA	33.33	556	FT	01/06/2017	PAY	
B	T/F	00131300	2016	SP				RA	33.33	0	SR	04/19/2017	PAY	
B	ACCS	00131300	2016	SP				RA	33.33	0	SR	04/19/2017	PAY	
B	T/F	00131300	2015	FL		Y	4,080	RP	33.33			11/25/2015	PAY	
B	ACCS	00131300	2015	FL			552	RP	33.33			11/25/2015	PAY	
B	T/F	00131300	2015	WN		Y	4,080	RP	33.33			01/08/2016	PAY	
B	ACCS	00131300	2015	WN			552	RP	33.33			01/08/2016	PAY	
B	T/F	00131300	2015	SP		Y	4,080	RP	33.33			04/01/2016	PAY	
B	ACCS	00131300	2015	SP			552	RP	33.33			04/01/2016	PAY	



Grant Record Changes (G-21)

- Changes/updates to student records:
 - Request Dependency Override
 - Update Income/Asset Information for student or parent
 - Misc. requests
- All G-21's submitted are reviewed by Commission staff before approval

Grant Record Changes

- Changes to Student Grant Record information must be approved by CSAC prior to final acceptance.
- The student's current values shown in red text next to the input boxes.

Search = SSN Acad Year = 2016-2017

Pending CSAC Approval

New Student
BANG V
SSN:
CSAC ID:

Date of Birth: 04/23/1998
Grant ID:

Educational Level (EL) Verification:
The above student's initial grant payment was or is to be made at this institution.
At the time of this grant payment the student's EL was (1-Freshman) verify without change ☐

☐ **Dependency Status Override:** My institution has determined that the student should be considered independent for purposes of establishing federal and campus financial aid eligibility not otherwise qualifying as an independent student. (Appropriate financial information must be provided below).

Dependency Status:

- ☒ Dependent
- ☐ Independent with dependents other than a spouse
- ☐ Independent without dependents other than a spouse

Estimated Family Contribution (EFC) Formula Calculation:

- ☒ Automatic Zero
- ☐ EFC Simplified
- ☐ Regular

Number of Family Members:	<input type="text" value="4"/>	(5)
EFC:	<input type="text" value="3537"/>	(1560)
Unmet Need:	<input type="text" value="5243"/>	(21556)
Parents:		
Marital Status:	<input type="text" value="Married or Remarried"/>	(Married or Remarried)
Total Income:	<input type="text" value="64381"/>	(51584)
Adjusted Net Worth (assets):	<input type="text" value="0"/>	(0)

Student (and Spouse):	
<input type="text"/>	(Single)
<input type="text"/>	(0)
<input type="text"/>	(0)

Registered Domestic Partnership:

- ☐ Parent
- ☐ Student

Reason:
DID NOT PASS INCOME CEILING

Dream Act Screens

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Dream Act ISIR Search Screen

California Student Aid Commission (SAPRD)[Portal Menu](#) [CA Dream Act](#) [Tools](#) [Help](#) [Sign Out](#)
WebGrants System

[CA Dream Act](#) [Dream Act ISIR Search](#) [Dream Act Paper Signature](#) [Dream Act New Application](#)

Dream Act ISIR Search

Student Search

Search by:

- Pseudo SSN
- Partial first name with minimum 3 characters
- Partial last name with minimum 2 characters
- Date of Birth and partial first or last name or both
- Email address before the @ with minimum 3 characters
- Partial school name or city with minimum 3 characters

Academic Year: 2016 - 2017 ▼

Pseudo SSN/SSN:

Student's first name:

Student's last name:

Student's DOB: / /

Email Address:

Student's School Name/City:

Search

Making education beyond high school financially accessible to all Californians.



Dream Act Search Results

Dream Act ISIR Search						
Record(s): 3		Search Results			Page: 1 of 2	
Pseudo SSN/SSN	Name Address	DOB Phone	Email Address User ID EFC	App Received Date Transaction Number Transaction Received Date	Submit Flag	
000052290	HERNANDEZ, LUIS 13000 STUDEBAKER BLVD NORWALK, CA. 90050	03/03/1993 (818) 562-2241	LUISHERNAN23@YAHOO.COM 2050909 0	01/12/2017 2 01/13/2017	Y	Correct Confirmation View Cal SAR report
000030537	HERNANDES, LUI 14 FERN ST. ONTARIO, CA. 92762	02/15/1991	LUIH@GMAIL.COM 2018443	1 01/20/2017		
000052741	HERNANDEZ, LUIS 211 ROSCOE RD CANOGA PARK, CA. 91304	10/04/1994	LUIS.1909@YAHOO.COM 2025256 2708	11/16/2016 1 11/16/2016	Y	Correct Confirmation View Cal SAR report
New Search						



Cal ISIR Correction Screen

Cal ISIR Correction Screen (2016-2017)

This screen is designed for schools to submit corrections to the most recent Cal ISIR data. Request will be updated real time.

- Data Corrections, Verification, and Dependency Overrides can be submitted at the same time.
- Verification Required – FAA marks the box when application is verified. Field only appears when student is selected for verification.
- Dependency Override – FAA marks the box when performing a dependency override. Overrides can be made in one direction only from dependent to independent.
- EFC Simulator – FAA can preview EFC changes prior to submitting a correction.
- Schools will be notified of processed corrections on the subsequent Cal ISIR Report.
- Students may review corrections by retrieving their CA Dream Act application.

Primary EFC : 0

Dependency Status : D

Transaction Received Date : 01/02/2016

Transaction Number : 2

User ID:

1) * Student's Last Name

(exactly as it appears on school records)

2) * Student's First Name

(exactly as it appears on school records)

3) Student's Middle Initial



Cal ISIR Correction Screen

Institution Name	USDE Code	Housing Program	
UNIV OF CA - RIVERSIDE	00131600	On campus	<input checked="" type="checkbox"/> X

Dependency Override

☐

* Date the application was initially received
Enter the month, day, and year (MM/DD/YYYY)

01/02/2016

Verification Required

☐

This student's application has been selected for verification.
Check this checkbox after verifying student's application
information.

Exit

Simulate

Submit



Confirmation View Screen

Dream Act ISIR Search[Back to Search Results](#)

2017 - 2018 Dream Application Confirmation Page

Dream ID #:	Transaction Date: 02/13/2017	Selective Service:
	Transaction Number: 1	

Section I-Action Needed	Comment Codes
No further action is needed. See Section III – Next Steps below.	000

Section II-No Resolution Needed	
We assumed certain information that is used to determine eligibility for state financial aid. If our assumptions are correct, do not change them. If they are incorrect, you need to make the necessary corrections.	117
You reported that you do not have children or other legal dependents, but you also reported that your number of family members is greater than 2. These answers are inconsistent. Please review these items and make the necessary corrections.	176

Section III - Next Steps	
If you need to make corrections to your information, you can make them online at www.caldreamact.org . You must use your User ID and password to retrieve your CA Dream Act Application. If you need additional help with your application, contact the Customer Relations Branch at the California Student Aid Commission Mon-Fri from 9:00 to 11:45 am or from 1:00 to 4:45 pm at 1-888-224-7268 or by email at studentsupport@csac.ca.gov .	006
If your mailing address or email address changes, you need to make the update on your CA Dream Act Application.	
Based on your application information, your Expected Family Contribution (EFC) is 0. Your school will use your EFC to determine your financial aid eligibility.	149
A certified GPA submitted by March 2, 2017 is required for Cal Grant consideration. For more information, check here .	
Create a WebGrants for Students (WGS) account with your CA Dream Act ID above and a valid email to view your application status and to confirm your GPA has been received, if applicable. The California Student Aid Commission communicates with you through email, so make sure your email address on WGS and in this application is always kept current.	
Your school must verify your AB 540 eligibility. Go to your Financial Aid Office or Admissions Office to find out where to start.	
If you need to make corrections or update estimated income and/or taxes, go to www.caldreamact.org and select the "Login To Application" button. Once the corrections have been made, you must "Submit" your application. If you are a dependent student, your parent must also "Re-sign" your application using the parent PIN.	
If you need additional help, please contact the Customer Relations Branch of the California Student Aid Commission Monday through Friday from 10 am – 11:45 am and	





Cal SAR Screen

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[CA Dream Act](#) [Dream Act ISIR Search](#) [Dream Act Paper Signature](#) [Dream Act New Application](#)

Dream Act ISIR Search [Back to Search Results](#)

Cal Student Aid Reports for GONZALO, N

Transaction Number	Submitted By	Processed	
2	Student and Parent	01/02/2016	
1	Student	01/02/2016	

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Cal SAR



California Student Aid Commission CA Dream Act Student Aid Report(2017-2018)

CA Dream Act Application Data

- Assumed fields, based on the data you entered, are marked with an "*" (asterisk) sign.
- The fields that are changed from last transaction are displayed in red.
- Parental data may still appear on the Cal SAR for applicant's that were initially deemed as a dependent student, but have changed to independent. However, only the student's information will be used in the determination of financial aid eligibility.

Your application has been selected for verification. Please check with your campus financial aid office to submit the required information.

Dream ID:

Transaction Number: 2

Submitted By:

Processed: 3/2/17

EFC:\$596

1. Your Last Name	
2. Your First Name	
3. Your Middle Initial	
4. Your Street or Post Office Mailing Address	
5. Your City	LOS ANGELES
6. Your State	CA
7. Your Zip Code	90001
8. Your Social Security Number (SSN) or Individual Taxpayer ID Number (ITIN)	
8a. Was your (SSN) issued after the DACA process?	
9. Your Date of Birth	
10. Your Permanent Phone Number	
11. Your Statewide Student Identification Number (SSID)	
12. Your Permanent Cell or Alternate Phone Number	
13. Your Driver's License Number	



California Dream Act ISIRs

California Student Aid Commission
WebGrants System

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Data Transfer Menu

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Report Download

- ▶ To download or display a report or data file click on the Retrieve File button.
- ▶ All data columns can be sorted either ascending or descending order by clicking on the blue column headings.
- ▶ To compare two roster files, select Grant Roster for Report and Data File for Media Type.
- ▶ To delete uploaded Audit Files, select Audit File for Report and the Delete checkbox column will appear.

School ID =

Acad Year = 2016-2017 ▼

Month = All ▼

Report = All ▼

Media Type = All ▼



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Revision: 13 Date: 2/4/2015 10:25:08 AM

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California Dream Act ISIRs

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[Data Transfer](#) [File Upload](#) [Report Download](#) [SSN/ID Main](#)

Report Download for CSU SACRAMENTO

- To download or display a report or data file click on the Retrieve File button.
- All data columns can be sorted either ascending or descending order by clicking on the blue column headings.
- To compare two roster files, select Grant Roster for Report and Data File for Media Type.
- To delete uploaded Audit Files, select Audit File for Report and the Delete checkbox column will appear.

School ID = 00115000

Acad Year = 2016-2017 ▼

Month = All ▼

Report = California Dream Act ISIRs ▼

Media Type = All ▼

GO!

Report Date ▼	Description	Media Type	Month	
24-JAN-16	California Dream Act ISIRs	Data File	JAN	Retrieve File
17-JAN-16	California Dream Act ISIRs	Data File	JAN	Retrieve File



What If...?

My student completed the incorrect application?

Complete
the
appropriate
application



Submit
Application
Conversion
Form
(G-55)



CSAC will
process the
conversion
and
notify the
school

Display Roster

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Display Roster

CSAC ID:										View History		Record: 17	
SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Renewal	EL Code	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section	
			E1	3	D	N	1	25978	4230	400.00%	100.00%	ELIGIBLE(1)	
Custom Codes		1	2	3	4	5							
High School Grad. Date Verification			Status: Not Verified			Verify As			New Grad Date: Jan 2016				
(High School Grad. Date Verification through CSAC) Request By : <input type="radio"/> Student <input type="radio"/> High School <input type="radio"/> College <input type="radio"/> CSAC													
Education Level (EL) Verification			Reported EL 1			Verified EL			Status 1 -- Verification Not Required				
Fall Term				Adj Reason Codes				Pay Status Codes				Delete Txn	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type				
	Totals	\$12,240	\$4,080										
A - On Hold	T/F	\$12,240	\$4,080						GRT				
Winter Term				Adj Reason Codes				Pay Status Codes				Delete Txn	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type				
	Totals	\$12,240	\$4,080										
A - On Hold	T/F	\$12,240	\$4,080						GRT				
Spring Term				Adj Reason Codes				Pay Status Codes				Delete Txn	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type				
	Totals	\$12,240	\$4,080										
A - On Hold	T/F	\$12,240	\$4,080						GRT				

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School Claiming Process

Making education beyond high school financially accessible to all Californians.



School Claiming Process

- 1. Award Status Extract File**
- 2. School Change Data File**



Display Roster

School ID = Acad Year = Format = Search = GO!
Total number of records: 1 Total number of pages: 1

SAVE

Verify ELs as reported

Update all records with custom code
 (Will display in Custom Code 5 field)
 Submit

CSAC ID: View History										Record: 1		
SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Renewal	EL Code	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section
			E1	1	D	N	1	25456	0	.00%	.00%	UNCONFIRMED(6)

Custom Codes 1 2 3 4 5

School of Attendance Confirmation Required
 Payment held, high school verification needed.

High School Grad. Date Verification

Status: Not Verified

Verify As

New Grad Date:

Education Level (EL) Verification

Reported EL 1

Verified EL

Status 1 -- Verification Not Required

Fall Term				Adj Reason Codes				Pay Status Codes				Delete Txn
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type			
Totals			\$0			<input type="text"/>	25456					
B - On Hold			\$0			<input type="text"/>						

Spring Term				Adj Reason Codes				Pay Status Codes				Delete Txn
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type			
Totals			\$0			<input type="text"/>	25456					
B - On Hold			\$0			<input type="text"/>						



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Display Roster

School ID = 00115000 Acad Year = 2017 - 2018 Format = CSAC Standard Roster Search = SSN

Total number of records: 1 Total number of pages: 1



Update all records with custom code
(Will display in Custom Code 5 field)

CSAC ID: View History Record: 1

SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Renewal	EL Code	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section
			E1	3	D	N	1	16405	64	.00%	.00%	UNCONFIRMED(6)

Custom Codes 1 2 3 4 5

School Change Required
School of Attendance Confirmation Required
Payment held, high school verification needed.

High School Grad. Date Verification Status: Not Verified Verify As New Grad Date: Jan 2017

Education Level (EL) Verification Reported EL 1 Verified EL Status 1 -- Verification Not Required

Fall Term

Adj Reason CodesPay Status CodesDelete Txn

Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type
Totals						SC			
B - On Hold						SC			
B - On Hold						SC			

Spring Term

Adj Reason CodesPay Status CodesDelete Txn

Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type
Totals									
B - On Hold									
B - On Hold									

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Reports

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Number of failed attempts since your last login: 1

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Revision: 9 Date: 12/14/2009 11:43:03 AM



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Data Transfer Menu

[File Upload](#)

[Report Download](#)

Report Download

- ✦ To download or display a report or data file click on the Retrieve File button.
- ✦ All data columns can be sorted either ascending or descending order by clicking on the blue column headings.
- ✦ To compare two roster files, select Grant Roster for Report and Data File for Media Type.
- ✦ To delete uploaded Audit Files, select Audit File for Report and the Delete checkbox column will appear.

School ID =

Acad Year =

2017-2018 ▼

Month =

All ▼

Report =

All ▼

Media Type =

All ▼

GO! ➔



What reports are available?

- Accept/Reject
- Award Status Extract
- School Change Upload
- E2 Verification
- Education Level (EL) Verification
- Education Level (EL) Verification Accept/Reject
- Grant Roster
- Monthly Payment Activity
- Cal C Supplement Recipient
- Unclaimed Awards



Accept/Reject Report

1 SABRAR2 - 01 (EDE COPY)		CALIFORNIA STUDENT AID COMMISSION										PAGE : 1			
		ACCEPT/REJECT REPORT										RUN DATE: 10/28/2011			
		ACADEMIC YEAR 2011										RUN TIME: 22:55:36			
REJECTED SECTION		00111100 - ALLAN HANCOCK COLLEGE													
GRANT ID#	SSN	STUDENT LASTNAME	FIRST NAME	M I	PROCESS DATE	SRC CODE	ACT CODE	PGM CODE	NEED	ADJ NEED	PAY TYPE	TERM	AMOUNT	ADJ RSN	PAY STATUS
6785: PAY TYPE ACC: SCHOOL HAS ALREADY REPORTED PAYMENT		GONZALEZ	ELIDA		10/28/2011	C	U	B	0	0	ACC	FL	776.00		PD
6785: PAY TYPE B&S: SCHOOL HAS ALREADY REPORTED PAYMENT			ROBERT		10/28/2011	C	U	C	0	0	B&S	FL	288.00		PD
6785: PAY TYPE ACC: SCHOOL HAS ALREADY REPORTED PAYMENT			JOSE	A	10/28/2011	C	U	B	0	0	ACC	FL	776.00		PD

TOTALS															
BATCH -		PAYMENTS REJECTED:		0		AMOUNT REJECTED:		0.00							
ONLINE -		PAYMENTS REJECTED:		AMOUNT REJECTED:											
COMBINED -		PAYMENTS COMBINED:		AMOUNT COMBINED:											

1SABRAR2 - 01 (EDE COPY)		CALIFORNIA STUDENT AID COMMISSION										PAGE : 2			
		ACCEPT/REJECT REPORT										RUN DATE: 10/28/2011			
		ACADEMIC YEAR 2011										RUN TIME: 22:55:36			
ACCEPTED SECTION		00111100 - ALLAN HANCOCK COLLEGE													
GRANT ID#	SSN	STUDENT LASTNAME	FIRST NAME	M I	PROCESS DATE	SRC CODE	ACT CODE	PGM CODE	NEED	ADJ NEED	PAY TYPE	TERM	AMOUNT	ADJ RSN	PAY STATUS
		ACEVEDO	AMALIA		10/28/2011	C	U	C	18498	0	B&S	FL	216.00		TT
		ACEVEDO	WILBRADO	J	10/28/2011	C	U	B	0	0	ACC	FL	776.00		PD
		ACEVAS	MIYU	V	10/28/2011	C	U	B	9389	0	ACC	FL	388.00		HT
		ACEVES	RICARDO		10/28/2011	C	U	B	0	0	ACC	FL	776.00		PD
		AGUILAR	JEANETTE		10/28/2011	C	U	B	0	0	ACC	FL	776.00		PD
		AGUILERA	ANA	J	10/28/2011	C	U	B	0	0	ACC	FL	776.00		PD
		ALBARRANSALINAS	MARIA	G	10/28/2011	C	U	C	0	0	B&S	FL	288.00		PD
		ALBRIGHT	MEGAN	R	10/28/2011	C	U	B	0	0	ACC	FL	776.00		PD



Reject Codes

Reject Codes	Description
6732	EL Verification Required
6733	Student not eligible for grant award
6738	Invalid payment status or adjustment reason
6776	Payment rejected due to application status code 30 or withdrawn
6780	Reported payment amount greater than prorated or maximum amount
6785	School has already reported payment
7520	Student record is not released for payment for E2 award per AB 840
8800	Current school has made payment in this academic year
8805	Duplicate transaction



Award Status Extract

567898205MILTON	JENNIFER	E19711026NC175844418227.5	B 1670		ACSS	1670
565439833ROMAN	AMY	P19850516NC175861614100	B 7142T/F	5472	ACSS	1670
580816087REYES	ADRIANA	O19850330NC175931094100	B 7142T/F	5472	ACSS	1670
687672303LEO	JESUS	P19720519NC176013053200	B 7142T/F	5472	ACSS	1670
649002369CETE	JEREMY	L19860124NC175899323200	B 7142T/F	5472	ACSS	1670
550220979GOOD	TONI	P19800729NC175993414100	B 1670		ACSS	1670
569877455TOMAS	LEILA	P19790620NC175932902200	B 7142T/F	5472	ACSS	1670
595551556RAMIREZ	BRITTANY	P19870903NC175811773200	B 7142T/F	5472	ACSS	1670
603280114FOU	ARTA	P19890717NC175918411100	B 7142T/F	5472	ACSS	1670
629914380WEATHER	RICH	S19891229NC176005349200	B 7142T/F	5472	ACSS	1670

538068129	No record found or application not processed
556084282	No record found or application not processed
613187790	No record found or application not processed
625228110	No record found or application not processed
615160682	No record found or application not processed
512377814	No record found or application not processed
658208245	No record found or application not processed
564672006	No record found or application not processed
207600189	No record found or application not processed
388568210	No record found or application not processed
426272227	No record found or application not processed
466877382	No record found or application not processed
528895131	No record found or application not processed

School Change Upload

SABCSCT
BATCH DATE: 06/20/2014

CALIFORNIA STUDENT AID COMMISSION
SCHOOL CHANGE DATA FILE UPLOAD REPORT
ACADEMIC YEAR 2014

```

PAGE: 5
RUN DATE: 06/20/2014
RUN TIME: 17:38:05

```

00131300 - UNIV OF CA - DAVIS

```

00000000 FL Student is not present in the roster
00000000 FL Invalid SSN
00000000 FL Student is not present in the roster
00000000 FL Student is not present in the roster
00000000 FL Invalid SSN
00000000 FL Invalid SSN
00000000 FL Student is not present in the roster
00000000 FL Invalid SSN
00000000 FL Student is not present in the roster
00000000 FL Student is not present in the roster
00000000 FL There are no record in grant application table for this SSN
00000000 FL Student is not present in the roster
00000000 FL This Entitlement Transfer record is on-hold awaiting the return of the (G6) Transfer Entitlement Cal Grant
Certification form. Once the information is verified the record will be released for school change by Commission staff.

```

Record Counts

Number of records read.....	1282
Number of records converted to school change transactions.....	1213
Number of records that could not be converted to school change transactions	168
Number of blank records.....	1

*** END OF REPORT ***

E2 Verification

AHTN09	00131200	UNIV OF CA - BERKELEY	28apr17					
608202373	2016 00131200	NICOS	RICO	A	E15149070	B	1	150
611733155	2016 00131200	LOREN	BEN		E16356971	B	1	300
618388654	2016 00131200	MARTIN	LITA	A	E16365028	B	1	200
616216667	2016 00131200	BERNETT	SAM		E16346358	B	1	200
626748655	2016 00131200	GAZIZ	SHAE	S	E15166463	B	1	100



Education Level (EL) Verification

ELTN09	00131200UNIV OF CA - BERKELEY 28apr17						
613880854	2016	00131200	3	RISTON	KAMIE	19960128	B 5 Unable to verify
621509079	2016	00131200	3	RUILA	MICKA	19950307	B 5 Unable to verify
564554504	2016	00131200	4	NORTON	SONNY	19650416	B 5 Unable to verify
800244171	2016	00131200	3	ZION	MILA	19961225	B 5 Unable to verify
556678508	2016	00131200	3	MONAN	DELANIE	19710521	B 5 Unable to verify
620644777	2016	00131200	3	ROSS	BETH	19861105	B 5 Unable to verify
617237510	2016	00131200	3	PARKER	BEN	J 19730908	B 5 Unable to verify
608841487	2016	00131200	3	MANER	DINA	I 19950728	B 5 Unable to verify
603359926	2016	00131200	3	GATES	MANU	19881105	B 5 Unable to verify
607922134	2016	00131200	3	BARREZ	RITA	19960815	B 5 Unable to verify
619724562	2016	00131200	3	MEREAU	ELICIA	N 19861221	B 5 Unable to verify
886336856	2016	00131200	3	KADO	SUNY	19930115	B 5 Unable to verify
607843310	2016	00131200	3	MAKER	MALI	19950708	B 5 Unable to verify



Education Level (EL) Verification Accept/Reject

SABELAR BATCH DATE: 01/23/2015		CALIFORNIA STUDENT AID COMMISSION EL VERIFICATION ACCEPT REJECT REPORT ACADEMIC YEAR 2014		PAGE: 1 RUN DATE: 01/23/2015 RUN TIME: 18:41:44
ACCEPTED SECTION		00131300		
SSN NBR	EL CODE	EL VERIFICATION STATUS		
00000000	3	3--Verified as reported		
00000000	3	3--Verified as reported		
00000000	3	3--Verified as reported		
00000000	3	4--Verified with change		
00000000	3	3--Verified as reported		
00000000	3	3--Verified as reported		
00000000	3	3--Verified as reported		
00000000	3	3--Verified as reported		
00000000	3	3--Verified as reported		
00000000	3	3--Verified as reported		
00000000	4	4--Verified with change		
00000000	3	3--Verified as reported		
00000000	3	3--Verified as reported		
00000000	3	3--Verified as reported		
00000000	3	3--Verified as reported		
SABELAR BATCH DATE: 08/22/2014		CALIFORNIA STUDENT AID COMMISSION EL VERIFICATION ACCEPT REJECT REPORT ACADEMIC YEAR 2014		PAGE: 15 RUN DATE: 08/22/2014 RUN TIME: 18:18:38
REJECTED SECTION		00131300 - UNIV OF CA - DAVIS		
SSN NBR	EL CODE	EL VERIFICATION STATUS - REJECT REASON		
00000000	3	3--Verified as reported School is not allowed to verify student EL code		
00000000	3	3--Verified as reported Invalid award status code		



Grant Roster

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Transaction Code	Action Code Flag	Section Indicator	Grant ID Number Flag	Grant ID Number	Social Security	Social Security Flag	Last Name	First Name	Middle Initial	Date of Birth	Program Code	Program Code Flag	Dependency Status	New-Renew Indicator	El Code
2	GPPR		1		E12	000000000						A	-E1	D	R	2
3	GPPR		1		E13	000000000						A	-E1	D	R	1
4	GPPR		1		E12	000000000						A	-E1	D	R	2
5	GPPR		1		E13	000000000						B	-E2	D	R	3
6	GPPR		1		E13	000000000						A	-E1	D	R	1
7	GPPR		1		E11	000000000						B	-E1	D	R	3
8	GPPR		1		E13	000000000						A	-E1	D	R	1
9	GPPR		1		E11	000000000						A	-E1	D	R	3
10	GPPR		1		E14	000000000						A	-E1	D	N	1
P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD		
El Code		Housing	CSAC Budget	EFC		Adjusted	Remaining	Forecasted	Annual Award	Annual Tuition/Fee	Annual Access	Annual Books &	Fall Total	Fall Tuition/		
El Code	Flag	Code	Amount	Amount	Need	Need	Eligibility	AY Eligibility	Amount	Amount	Amount	Supplies Amount	Amount	Fee Amount		
2		2	\$28,929	\$0	\$20,070		133.36%	100.00%	\$12,192	\$12,192	\$0	\$0	\$4,064.00	\$4,064.00		
1		1	\$33,802	\$0	\$33,802		233.35%	100.00%	\$12,192	\$12,192	\$0	\$0	\$4,064.00	\$4,064.00		
2		1	\$33,802	\$0	\$32,342		133.36%	100.00%	\$12,192	\$12,192	\$0	\$0	\$4,064.00	\$4,064.00		
3		2	\$28,929	\$0	\$26,971		33.35%	100.00%	\$13,840	\$12,192	\$1,648	\$0	\$4,613.00	\$4,064.00		
1		1	\$33,802	\$0	\$31,600		400.00%	100.00%	\$12,192	\$12,192	\$0	\$0	\$0.00	\$0.00		
3		3	\$25,737	\$0	\$25,737		133.34%	100.00%	\$13,840	\$12,192	\$1,648	\$0	\$4,613.00	\$4,064.00		
1		1	\$33,802	\$0	\$30,641		233.35%	100.00%	\$12,192	\$12,192	\$0	\$0	\$4,064.00	\$4,064.00		
3		1	\$33,802	\$0	\$33,802		100.03%	100.00%	\$12,192	\$12,192	\$0	\$0	\$4,064.00	\$4,064.00		
1		1	\$33,802	\$0	\$33,802	*****	333.34%	100.00%	\$12,192	\$12,192	\$0	\$0	\$4,064.00	\$4,064.00		

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Monthly Payment Activity Report

1 SABRMPA1 - 01		CALIFORNIA STUDENT AID COMMISSION		PAGE NO: 1	
		PAYMENT ACTIVITY REPORT		RUN DATE: 11/19/2011	
		ACCOUNTING SUMMARY		RUN TIME: 03:40:30	
		ACADEMIC YEAR 2011			
		00111100 - ALLAN HANCOCK COLLEGE			
DATE ----	ACTIVITY -----	FUNDS DISBURSED TO INSTITUTION -----	PAYMENT TRANSACTIONS -----	BALANCE -----	
08-23-11	FALL ADVANCE	141,653.00		141,653.00	
08-26-11	FALL RECONCILED PAYMENT TRANSACTIONS		0.00	141,653.00	
09-02-11	FALL RECONCILED PAYMENT TRANSACTIONS		0.00	141,653.00	
10-07-11	FALL RECONCILED PAYMENT TRANSACTIONS		0.00	141,653.00	
10-28-11	FALL RECONCILED PAYMENT TRANSACTIONS		260,346.00	-118,693.00	
10-28-11	RECONCILED PAYMENT TO INSTITUTION	118,693.00		0.00	
11-04-11	FALL RECONCILED PAYMENT TRANSACTIONS		704.00	-704.00	
11-04-11	RECONCILED PAYMENT TO INSTITUTION	704.00		0.00	
11-18-11	FALL RECONCILED PAYMENT TRANSACTIONS		1,374.00	-1,374.00	
11-18-11	RECONCILED PAYMENT TO INSTITUTION	1,374.00		0.00	
TOTAL FUNDS DISBURSED / TOTAL PAYMENTS		262,424.00	262,424.00		

	YEAR-TO-DATE ACTIVITY				
	FALL	WINTER	SPRING	SUMMER	TOTAL
CAT/F	0.00	0.00	0.00	0.00	0.00
CBT/F	0.00	0.00	0.00	0.00	0.00
CBACC	255,692.00	0.00	0.00	0.00	255,692.00
CBTOTAL	255,692.00	0.00	0.00	0.00	255,692.00
CCI/F	0.00	0.00	0.00	0.00	0.00
CCB/S	6,732.00	0.00	0.00	0.00	6,732.00
CCITOTAL	6,732.00	0.00	0.00	0.00	6,732.00
GFT/F	0.00	0.00	0.00	0.00	0.00
TOTAL	262,424.00	0.00	0.00	0.00	
GRAND TOTAL					262,424.00

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Cal Grant C Supplement Recipient

CAL C SUPPLEMENT RECIPIENT REPORT
ACADEMIC YEAR 2014

FULLERTON COLLEGE - 00120100

08/15/2014

SSN	Last	First	MI	Address	City	State	Zip Code	CSupp Form
00000000	ORO	ED		320 VERMONT AVENUE	ANAHEIM	CA	928	N
00000000	VAZQUEZ	KEVIN		2432 CLIFHURST ST	ROWLAND HEIGHTS	CA	928	Y
00000000	RAMOS	FERNANDA		445 ARIEL PARK DRIVE	ANAHEIM	CA	928	Y
00000000	MENDEZ	JORGE		438 RASKIN DRIVE	ROWLAND HEIGHTS	CA	917	N
00000000	RAMIREZ	PETER		31 FIRST AVE	LA HABRA	CA	906	Y
00000000	CARRILLO	AL		533 WEST ST	PALM SPRINGS	CA	928	Y
00000000	SANTIAGO	ANIEE		3030 JACKSON AVE	YORBA LINDA	CA	928	N
00000000	PANH	JESS		13 MARIE DRIVE	FULLERTON	CA	928	N
00000000	TRAN	ANNE		1 EAST OLIVE AVE	ANAHEIM	CA	928	N
00000000	MARIN	CHRIS		322 WEATLH WAY APT A	LA HABRA	CA	928	N
00000000	SANCHEZ	FRANK		41 SUNRISE DR	PALM SPRINGS	CA	922	N
00000000	JAM	DON		20 S BAY WAY	YORBA LINDA	CA	928	N
00000000	HUY	DAN		162 BAKER AVE	LA HABRA	CA	928	N
00000000	VAL	REY		130 VALENCIA AVE	FULLERTON	CA	928	N
00000000	ESTRADAHERNANDEZ	ALEJANDRA		309 COMMON ST	FULLERTON	CA	928	N
00000000	TUAN	FAY		250 BROOK AVE	ANAHEIM	CA	928	N

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Unclaimed Awards

ucar-2016-00131300-21apr17.txt
BATCH DATE: 04/21/2017

CALIFORNIA STUDENT AID COMMISSION
UNCLAIMED AWARDS FOR UNIV OF CA - DAVIS (00131300)
ACADEMIC YEAR 2016

PAGE: 1
RUN DATE: 04/22/2017
RUN TIME: 01:35:27

SSN	LAST NAME	FIRST NAME	M BIRTH I DATE	CYCLE ID	PROG CODE	NEW/ REN	CURRENT SCHOOL	LOA ADDRESS
000010524	NAVA	ARIA	G 12/01/1992	E2	B	R	Y	91 NORMINGTON CT STOCKTON, CA 95207 NAVAMARIA@GMAIL.COM
000040110	HERRON	FRED	C 08/31/1994	E1	B	R	Y	838 EUREKA AVENUE SPC. 20 YUBA CITY, CA 95991 HGNA@HOTMAIL.COM
000024311	AQUINO	ZAIR	Y 04/16/1993	E2	B	N	Y	280 GREENSBORO DRIVE SACRAMENTO, CA 95833 ZAIR@GMAIL.COM
000014612	RENO	ERIKA	C 01/01/1993	E2	B	N	Y	261 ADELA AVENUE DAVIS, CA 95616 VC21@GMAIL.COM
000066120	ANTON	VICTOR	12/31/1990	E2	B	N	Y	173 WILBUR STREET APT.8 CONCORD, CA 94520 APA412@HOTMAIL.COM

Tools


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Locating tools in WebGrants

California Student Aid Commission (SAPRD)
WebGrants System

[Tools](#) [Help](#) [Sign Out](#)

**Welcome! SA3JXW**
To the CSAC Portal Menu

The last time you logged on to this system was: 03/30/2012 09:31:44 am
Number of failed attempts since your last login: 0

Please contact your School's System Administrator if you need access to additional screens.

Portal Menu	Account Information
WebGrants Table Edit User Administration	View Your Account Details Help With Your Account



The Tools Page in WebGrants

Tools	
<ul style="list-style-type: none">✦ *Note: Systems that have upgraded to Microsoft Office Excel 2007 will encounter a file format error while exporting HTML in Excel format with an extension (xlsm). For best results download the "Template for Excel 2007" to your computer. *See under "Description" for saving the converted template to your computer✦ Each of these tools involves downloading files that use external software. Some require that additional software be resident on the user's computer✦ For best results, right click on the link and select the "Save" option.✦ A Users Guide containing further descriptions and instructions for each of these tools is located in the Help Center	
Tools	Description
✦ Roster Data File Compare -- Delphi	Provides comparisons between a previous roster data file and the current file
✦ Excel Grant Roster Template -- for Excel '97	Formats roster data files into a Microsoft Excel spreadsheet
✦ Excel Grant Roster Template -- for Excel 2000	Formats roster data files into a Microsoft Excel spreadsheet
✦ Excel Grant Roster Template -- for Excel 2007	<p>*Right-click the link "Excel Grant Roster Template" and select "Save Link As" option to save the template to your computer. Change the name of the file to (.xlsm) and save</p>



Available Tools in WebGrants

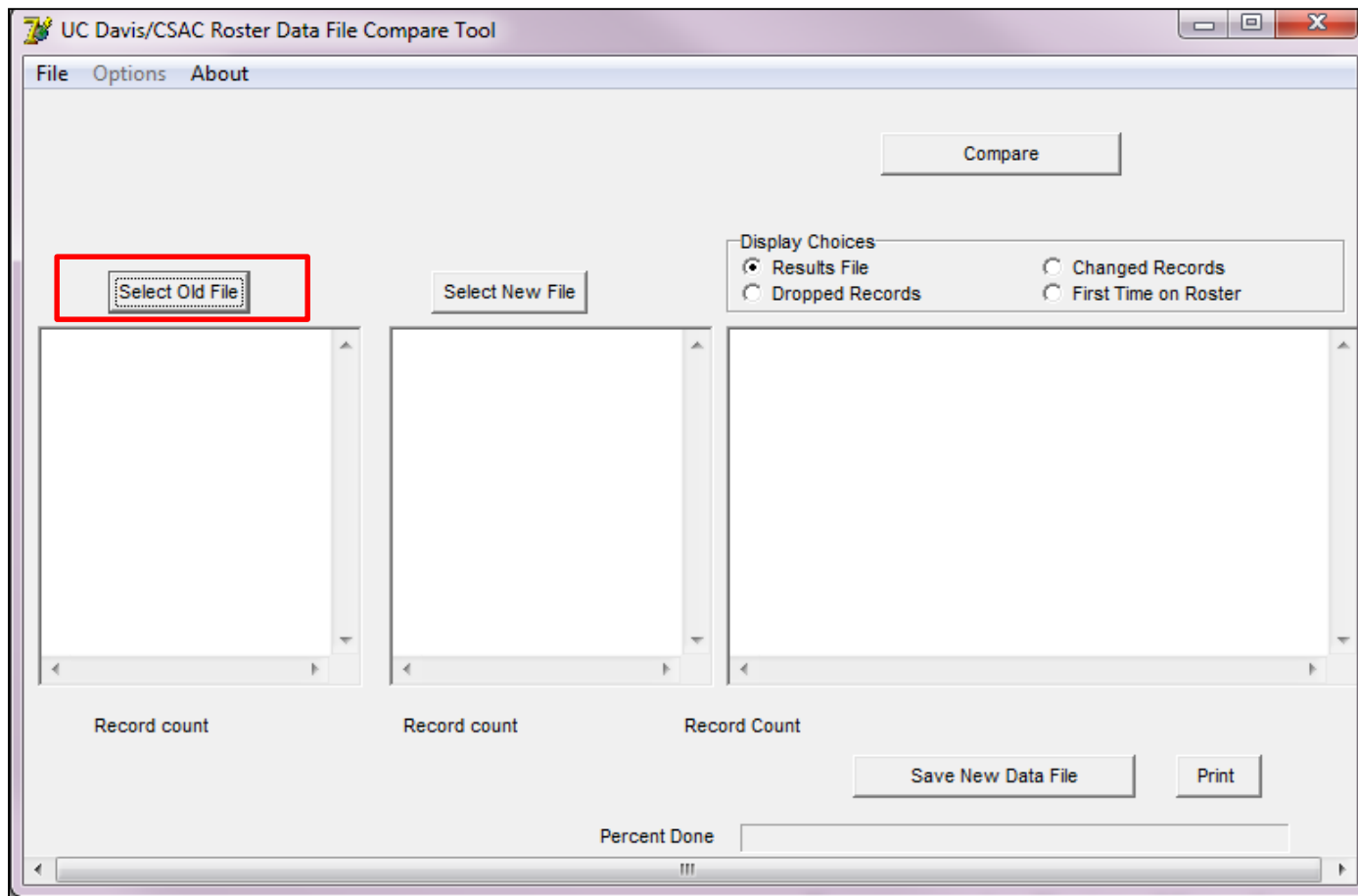
- **Roster Data File Comparison-** Provides comparisons between a previous roster data file and the current file
- **Grant Roster Template-** Formats roster data files into a Microsoft Excel Spreadsheet
- **Reconciliation Template-** Formats reconciliation data files into a Microsoft Excel spreadsheet
- **EL Verification Template-** Formats EL Verification data files into a Microsoft Excel spreadsheet
- **Unclaimed Awards Template-** Formats Unclaimed award data files into a Microsoft Excel spreadsheet



Roster Data File Compare



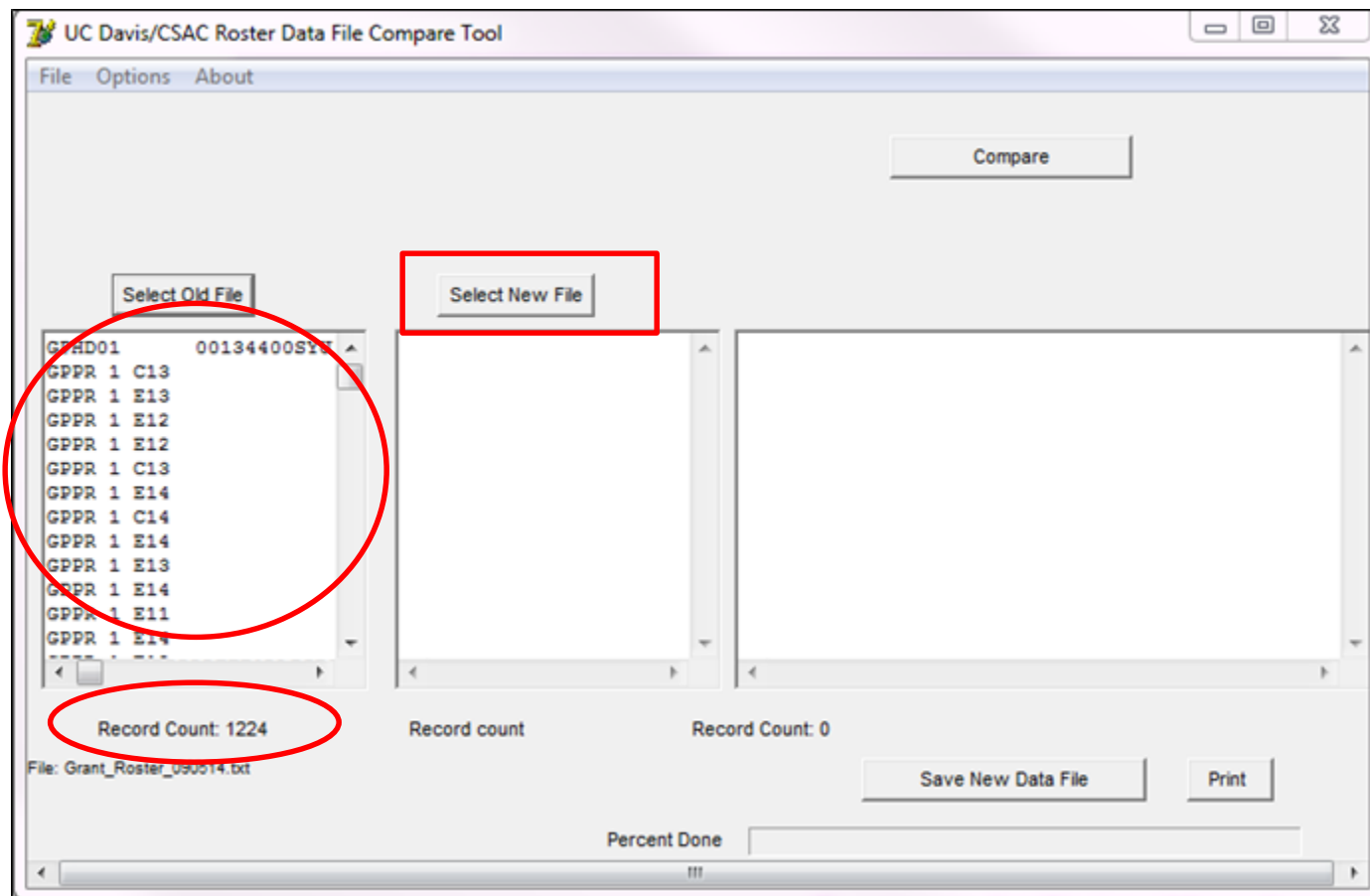
Roster Data File Compare



Making education beyond high school financially accessible to all Californians.

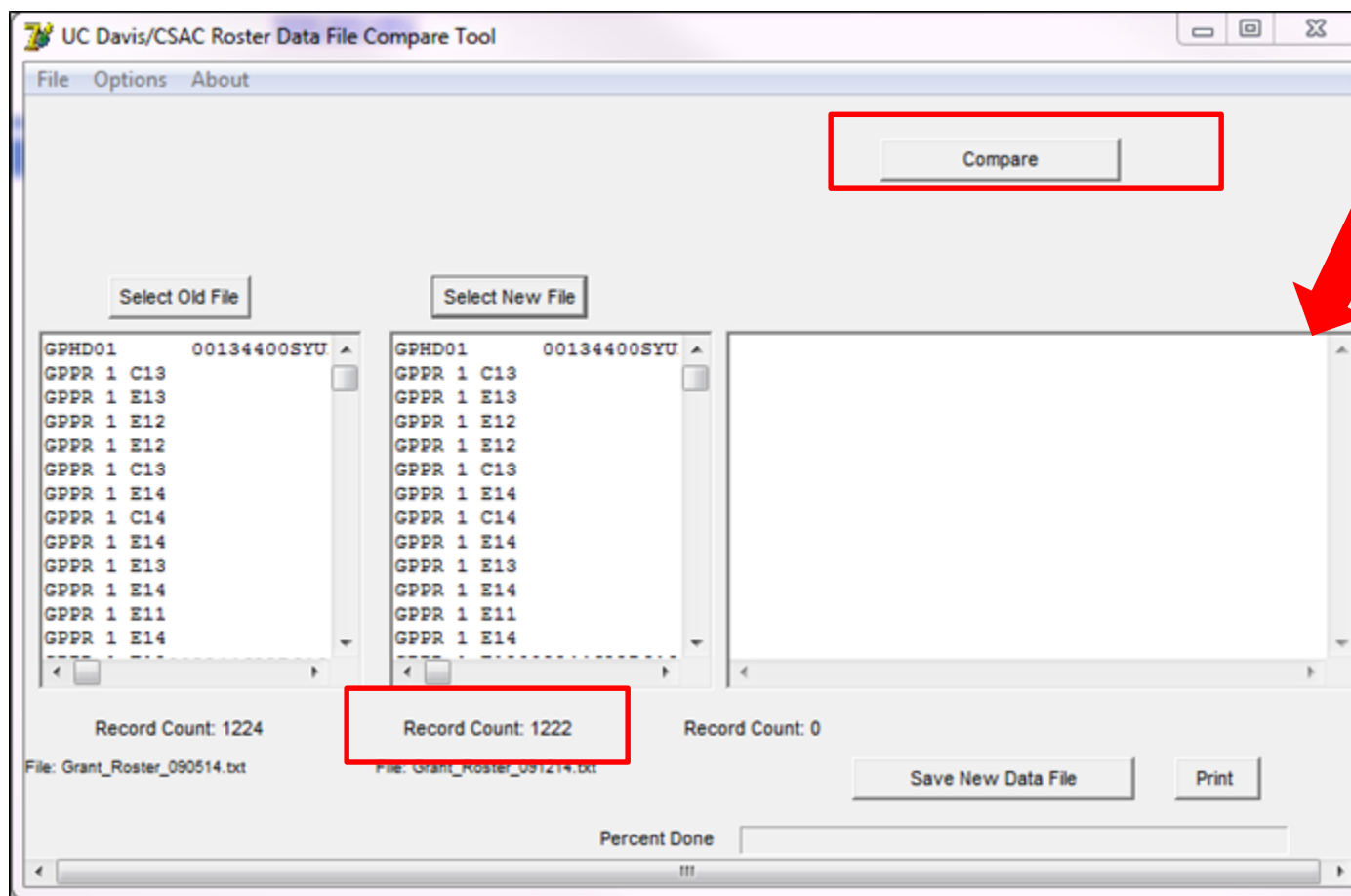


Roster Data File Compare





Roster Data File Compare



Making education beyond high school financially accessible to all Californians.



Roster Data File Compare

The screenshot shows the 'UC Davis/CSAC Roster Data File Compare Tool' window. It features a menu bar with 'File', 'Options', and 'About'. A 'Compare' button is at the top right. Below it are 'Select Old File' and 'Select New File' buttons. A red box highlights the 'Display Choices' section, which contains four radio buttons: 'Results File', 'Dropped Records' (selected), 'Changed Records', and 'First Time on Roster'. The main area has three text boxes displaying roster data. The first two boxes show a list of records for 'GPHD01 00134400SYU'. The third box shows a comparison of two records for 'GPPR 3 E14', with 'MALDONADO VILLA' and 'SARJES' listed. At the bottom, there are fields for 'Record Count' (1224 and 1222), 'Drop Records: 2', and file names 'Grant_Roster_090514.txt' and 'Grant_Roster_091214.txt'. There are also buttons for 'Save Dropped Data' and 'Print', and a 'Percent Done' progress bar.

UC Davis/CSAC Roster Data File Compare Tool

File Options About

Compare

Select Old File Select New File

Display Choices

- ☐ Results File
- ☒ Dropped Records
- ☐ Changed Records
- ☐ First Time on Roster

GPHD01 00134400SYU

GPPR 1 C13

GPPR 1 E13

GPPR 1 E12

GPPR 1 E12

GPPR 1 C13

GPPR 1 E14

GPPR 1 C14

GPPR 1 E14

GPPR 1 E13

GPPR 1 E14

GPPR 1 E11

GPPR 1 E14

Record Count: 1224

File: Grant_Roster_090514.txt

GPHD01 00134400SYU

GPPR 1 C13

GPPR 1 E13

GPPR 1 E12

GPPR 1 E12

GPPR 1 C13

GPPR 1 E14

GPPR 1 C14

GPPR 1 E14

GPPR 1 E13

GPPR 1 E14

GPPR 1 E11

GPPR 1 E14

Record Count: 1222

File: Grant_Roster_091214.txt

GPPR 3 E14

GPPR 3 E14

MALDONADO VILLA

SARJES

Drop Records: 2

Save Dropped Data

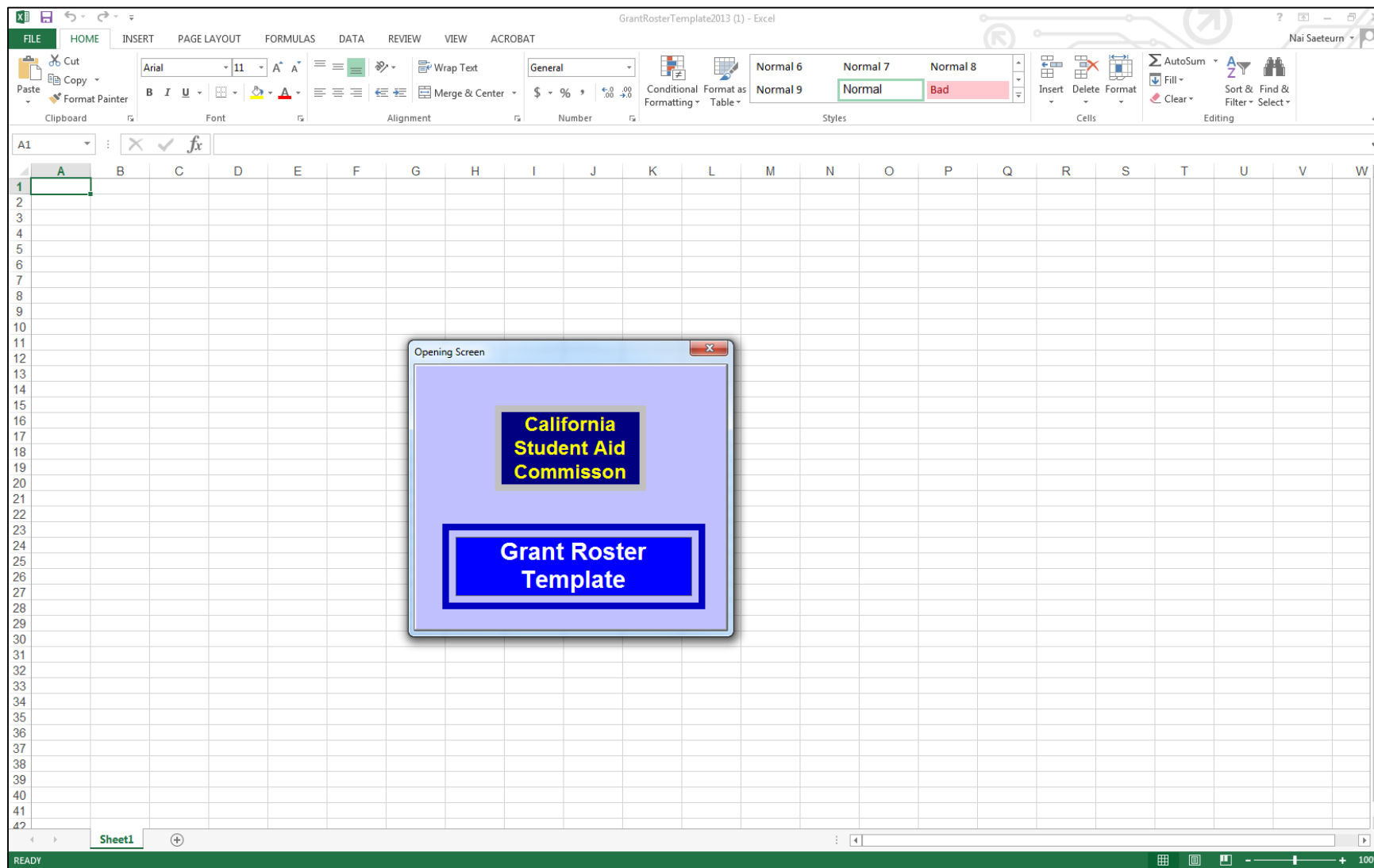
Print

Percent Done

Grant Roster Template

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Grant Roster Template



GrantRosterTemplate2013 (1) - Excel

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW ACROBAT

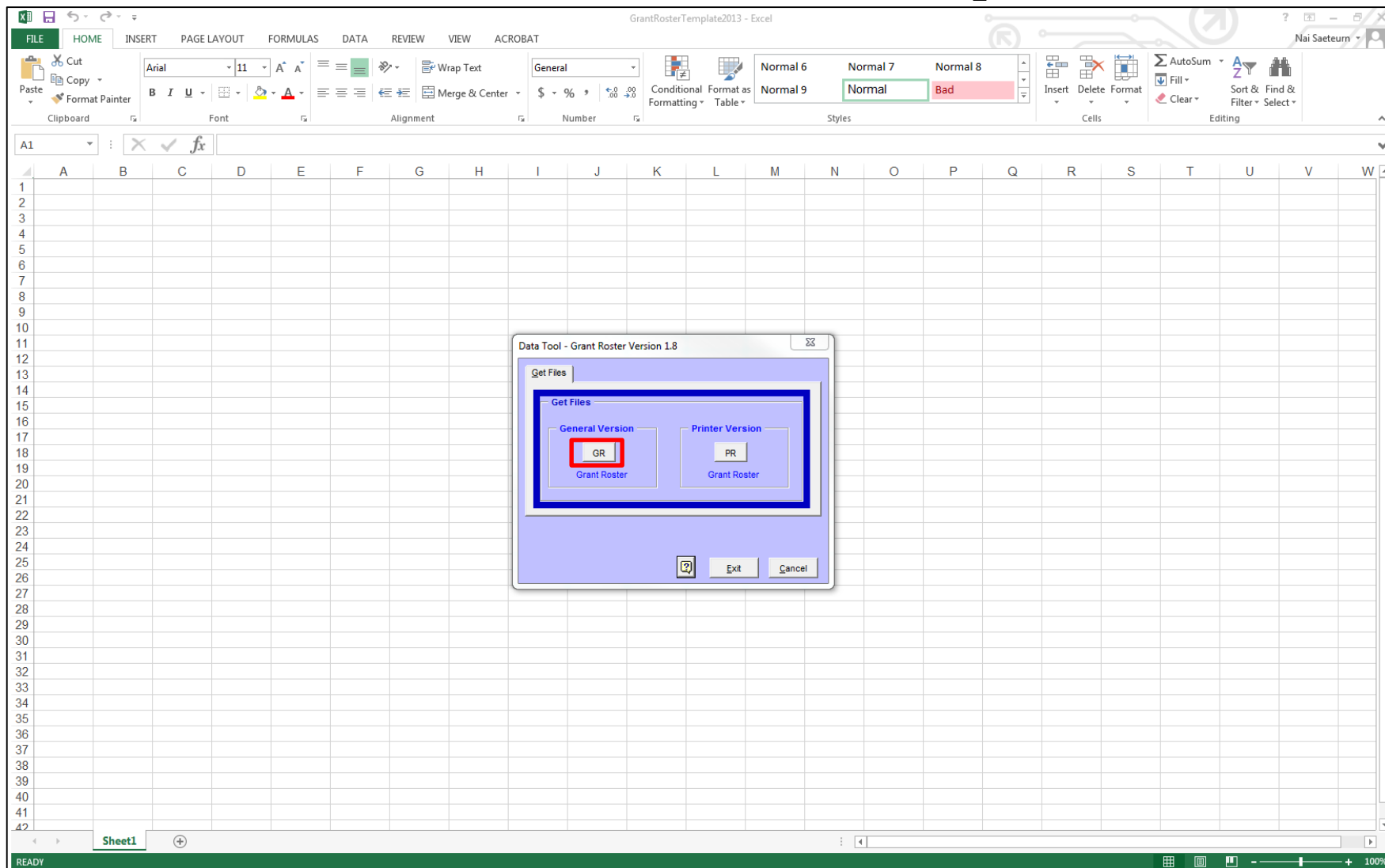
Clipboard Font Paragraph Alignment Number Styles Cells Editing

Opening Screen

California
Student Aid
Commission

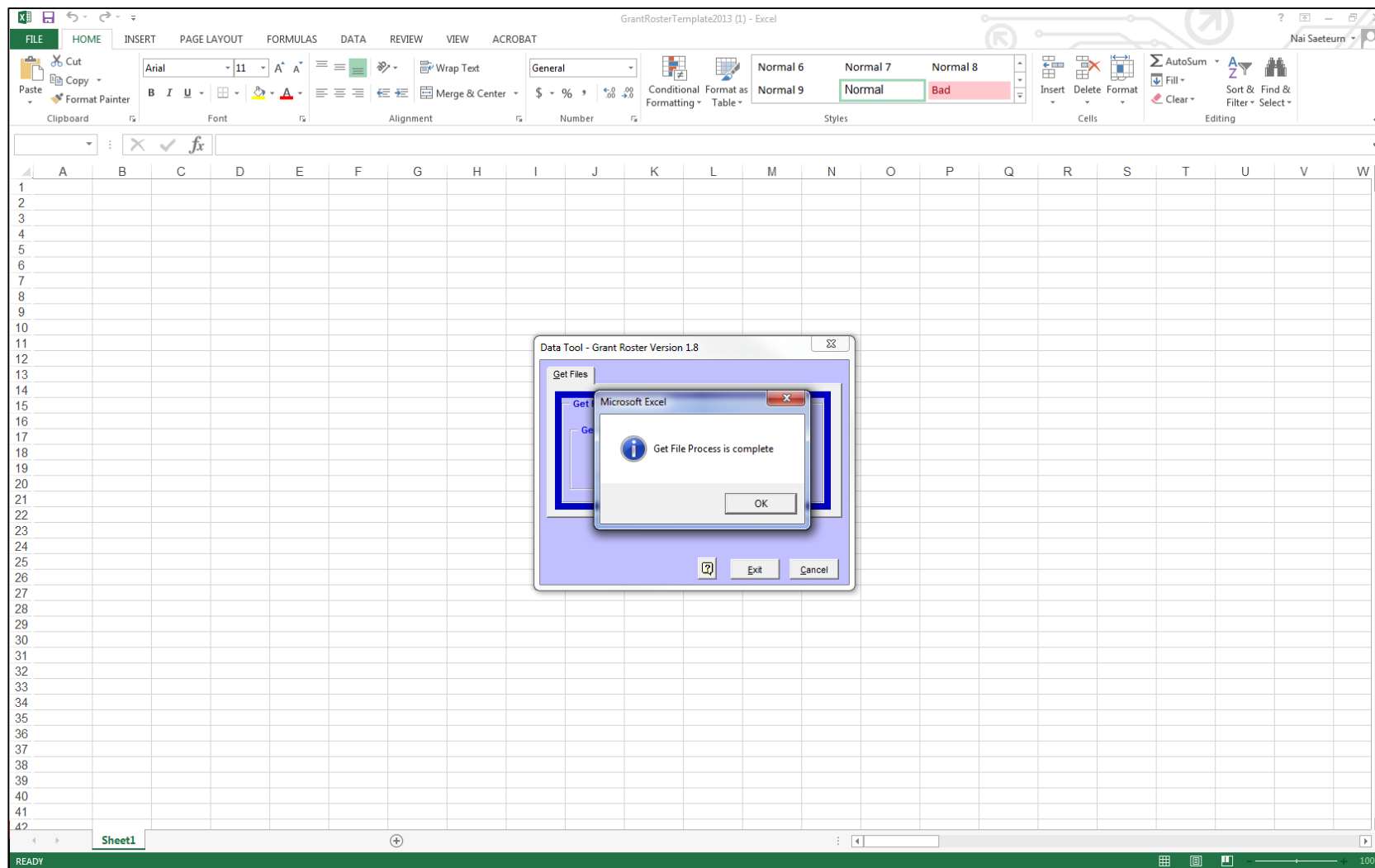
Grant Roster
Template

Grant Roster Template



The screenshot displays the Microsoft Excel interface with the 'GrantRosterTemplate2013 - Excel' file open. The ribbon is set to 'HOME', showing various formatting and editing tools. A dialog box titled 'Data Tool - Grant Roster Version 1.8' is centered on the screen. This dialog box has a 'Get Files' tab and contains two main sections: 'General Version' and 'Printer Version'. The 'General Version' section features a button labeled 'GR' which is highlighted with a red rectangular border. Below this button is the text 'Grant Roster'. The 'Printer Version' section features a button labeled 'PR' with the text 'Grant Roster' below it. At the bottom of the dialog box, there are three buttons: a help icon, 'Exit', and 'Cancel'. The background shows a blank Excel grid with columns A through W and rows 1 through 42 visible.

Grant Roster Template





Reconciliation Template

Making education beyond high school financially accessible to all Californians.



Reconciliation Template

◆ [Excel Reconciliation Template](#)

Formats reconciliation data files into a Microsoft Excel spreadsheet

◆ [Excel Reconciliation Template --
for Excel 2007](#)

*Right-click the link "Excel Reconciliation Template" and select "Save Link As" option to save the template to your computer. Change the name of the file to (.xlsm) and save

◆ [Excel Reconciliation Template ---
Excel 2010](#)

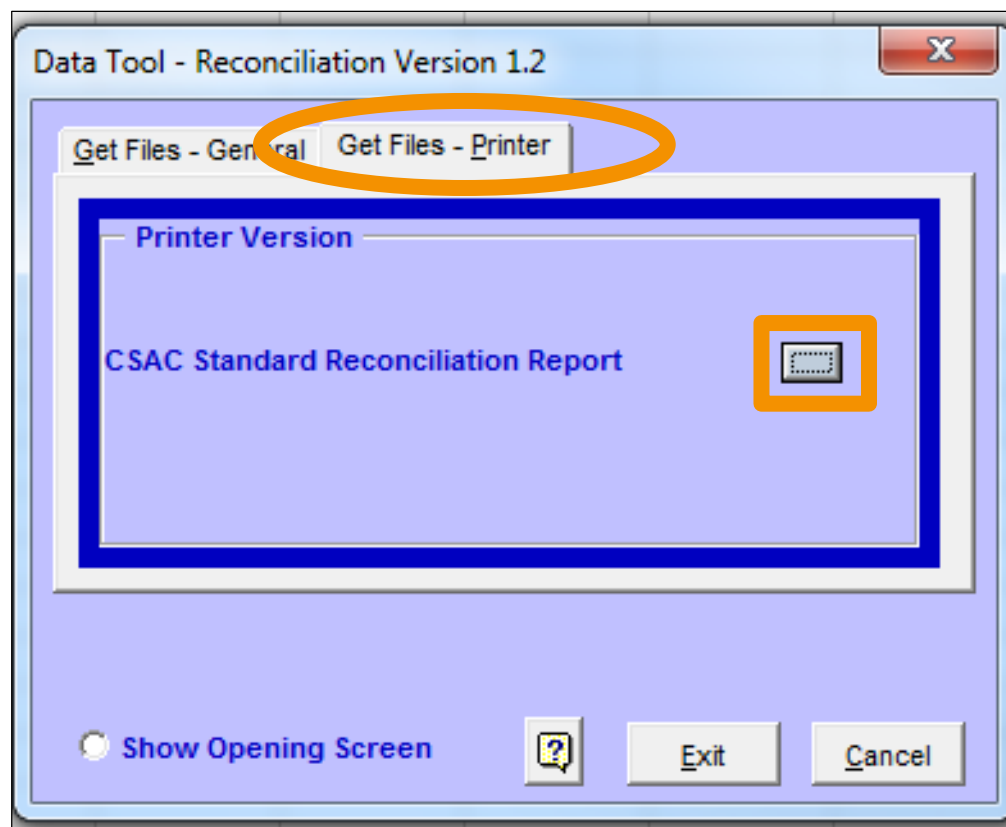
Formats reconciliation data files into a Microsoft Excel spreadsheet

◆ [Excel Reconciliation Template ---
Excel 2013](#)

Formats reconciliation data files into a Microsoft Excel spreadsheet



Reconciliation Template



Making education beyond high school financially accessible to all Californians.



Helpful Strategies

- Save the tools into a folder on your computer for easy access
- Save the desired data file report(s) to your computer
- Import the data file report into the appropriate tool





Customizing Your Roster

Making education beyond high school financially accessible to all Californians.



Customizing Your Roster

California Student Aid Commission (SAPRD)

[Portal Menu](#) [WebGrants](#) [Tools](#) [Help](#) [Sign Out](#)

WebGrants System

[Enrollment](#) [GPA](#) [Student Info](#) [School Info](#) [Roster/Reconciliation](#) [Data Transfer](#) [Chafee Grant](#) [Accounting](#)
[NON-SSN GPA](#)

[Roster/Reconciliation](#) [Customize Roster](#) [Display Roster](#) [Print Roster](#) [Customize Reconciliation](#) [Display Reconciliation](#)
[Display Accept / Reject Report](#)

Roster Menu

[Customize Roster](#)
[Display Roster](#)
[Print Roster](#)

Reconciliation

[Customize Reconciliation](#)
[Display Reconciliation](#)
[Display Accept / Reject Report](#)

Making education beyond high school financially accessible to all Californians.



Customizing Your Roster


California Student Aid Commission (TEST1)[Portal Menu](#)[WebGrants](#)[Tools](#)[Help](#)[Sign Out](#)


WebGrants System[Enrollment](#)[GPA](#)[Student Info](#)[School Info](#)[Roster/Reconciliation](#)[Data Transfer](#)[Chafee Grant](#)[Accounting](#)[Web Service Registration](#)[NON-SSN GPA](#)

[Roster/Reconciliation](#)[Customize Roster](#)[Display Roster](#)[Print Roster](#)[Customize Reconciliation](#)[Display Reconciliation](#)[Display Accept / Reject Report](#)[Override Supplement Payment](#)

Customize Roster

- ♦ The following is a list of your roster formats.
- ♦ The CSAC Standard Roster format can not be changed or deleted.
- ♦ Existing roster formats can be copied, edited and renamed.
- ♦ Any roster format can be chosen as the "Preferred Format." The Preferred Format will display automatically when "Display Roster" is selected from the Roster Main menu.



Row #	Name	Preferred Format	Edit	Delete
1	CSAC Standard Roster	<input type="radio"/>		



Customizing Your Roster

Roster Format Title

Roster Format

New Unpaid Comp CGB

Preferred ☐ Yes ☒ No

Select Data Elements and Column Order

- "Data Elements Available" contains a list of all available roster elements.
- Click and highlight each data element that you wish to display on your roster.
- For multiple selections, click on the first element and then hold down the CTRL key to select additional elements.
- Once items are highlighted, click on "Add Data Element(s)".
- The "Data Elements Selected" box will reflect the column headings that will display on your roster format.
- "Remove Data Element(s)" will delete the selected elements from your selection list.
- Use the "Move Up" and "Move Down" to order the individual column headings for display.
- After selecting data elements, click "Continue" to choose sort options.

Data Elements Available

Add Data Element(s)

Remove Data Element(s)

Data Elements Selected

SSN
DOB
Grant ID
Cycle ID
Housing Code
Dep Status
New / Renewal
EL Code
CSAC Budget
EFC

Move Up

Move Down



Customizing Your Roster

Select Data Elements and Column Order

- "Data Elements Available" contains a list of all available roster elements.
- Click and highlight each data element that you wish to display on your roster.
- For multiple selections, click on the first element and then hold down the CTRL key to select additional elements.
- Once items are highlighted, click on "Add Data Element(s)".
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Data Elements Available

Add Data Element(s)

Remove Data Element(s)

Data Elements Selected

SSN
DOB
Grant ID
Cycle ID
Housing Code
Dep Status
New / Renewal
EL Code
CSAC Budget
EFC

Move Up

Move Down

Select Terms

- Select the term(s) you wish to display
- Selecting only one(1) term will allow users to sort records by term-specific data elements
- After selecting term(s), click "Continue" to choose sort options



Customizing Your Roster

Select Terms

- Select the term(s) you wish to display
- Selecting only one(1) term will allow users to sort records by term-specific data elements
- After selecting term(s), click "Continue" to choose sort options

☐ Fall☐ Winter☐ Spring☐ Summer

Continue

Define Sort Order Preferences

Click drop down boxes to choose elements for sort.

First Sort Preference	Roster Section	Ascending
Second Sort Preference	Last Name	Ascending
Third Sort Preference	First Name	Ascending
Fourth Sort Preference	Middle Initial	Ascending
Fifth Sort Preference	SSN	Ascending
Sixth Sort Preference		Ascending

Define Selection Criteria

- Check boxes below to limit the records you wish to display.
- A checked box means that only records with those values will be included. (If no box or every box is checked in a category, you will see all those records for your school.)



Customizing Your Roster

Define Selection Criteria

Check boxes below to limit the records you wish to display.
A checked box means that only records with those values will be included. (If no box or every box is checked in a category, you will see all those records for your school.)

Cycle ID	<input type="checkbox"/> E1	<input type="checkbox"/> E2	<input checked="" type="checkbox"/> C1	<input checked="" type="checkbox"/> C2
Award Type	<input type="checkbox"/> Tuition/Fees	<input type="checkbox"/> Access	<input type="checkbox"/> Books & Supplies	
Housing Code	<input type="checkbox"/> On Campus (1)	<input type="checkbox"/> Off Campus (2)	<input type="checkbox"/> With Parents (3)	
Dependency Status	<input type="checkbox"/> Dependent	<input type="checkbox"/> Independent		
EL (Education Level)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4 <input type="checkbox"/> 5+
EL Status	<input type="checkbox"/> Verification Not Required (1)		<input type="checkbox"/> Not Paid, Verif Required (2)	
	<input type="checkbox"/> Verified As Reported (3)		<input type="checkbox"/> Verified with Change (4)	
	<input type="checkbox"/> Unable to Verify (5)		<input type="checkbox"/> Paid, Verification Required (6)	
New/Renewal Students	<input checked="" type="checkbox"/> New	<input type="checkbox"/> Renewal		
Program Code	<input type="checkbox"/> A	<input checked="" type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> T
Section	<input checked="" type="checkbox"/> Eligible	<input checked="" type="checkbox"/> CC Reserve	<input checked="" type="checkbox"/> Ineligible	<input type="checkbox"/> Not In Attendance
Extra Eligibility	<input type="checkbox"/> TCP	<input type="checkbox"/> 5th Year	<input type="checkbox"/> Not TCP nor 5th Year	
E1 On Hold Status	<input type="checkbox"/> Verification Required		<input checked="" type="checkbox"/> Verification Completed	
	<input type="checkbox"/> Verification Not Required			
E2 On Hold Status	<input type="checkbox"/> Waiting for G6 Return		<input type="checkbox"/> Requires Verification by School	
	<input type="checkbox"/> School Verified Eligible		<input type="checkbox"/> School Verified Ineligible	

Save Roster Format

Making


ornians.



Customizing Your Roster

Online Roster

- Be sure to save all entries before exiting the Roster or changes will be lost.
- Please note that Leave of Absence (LA) payment transactions for newly awarded Competitive Cal Grant students will not be accepted. Only student initiated LA transactions will be accepted via WebGrants for Students or by contacting CSAC.**

School ID = Acad Year = 2017 - 2018 ▼ Format = CSAC Standard Roster ▼ Search = SSN ▼ 

CSAC Standard Roster

New Unpaid Comp CGB



Best Practice

- Renew your access each year
- Contact Technology Help Desk for access assistance
 - 888-294-0148
 - csachelpdesk@csac.ca.gov
- Contact Institution Support for assistance
 - 888-294-0153
 - schoolsupport@csac.ca.gov

California Student Aid Commission

**Payments
and
Reconciliation**



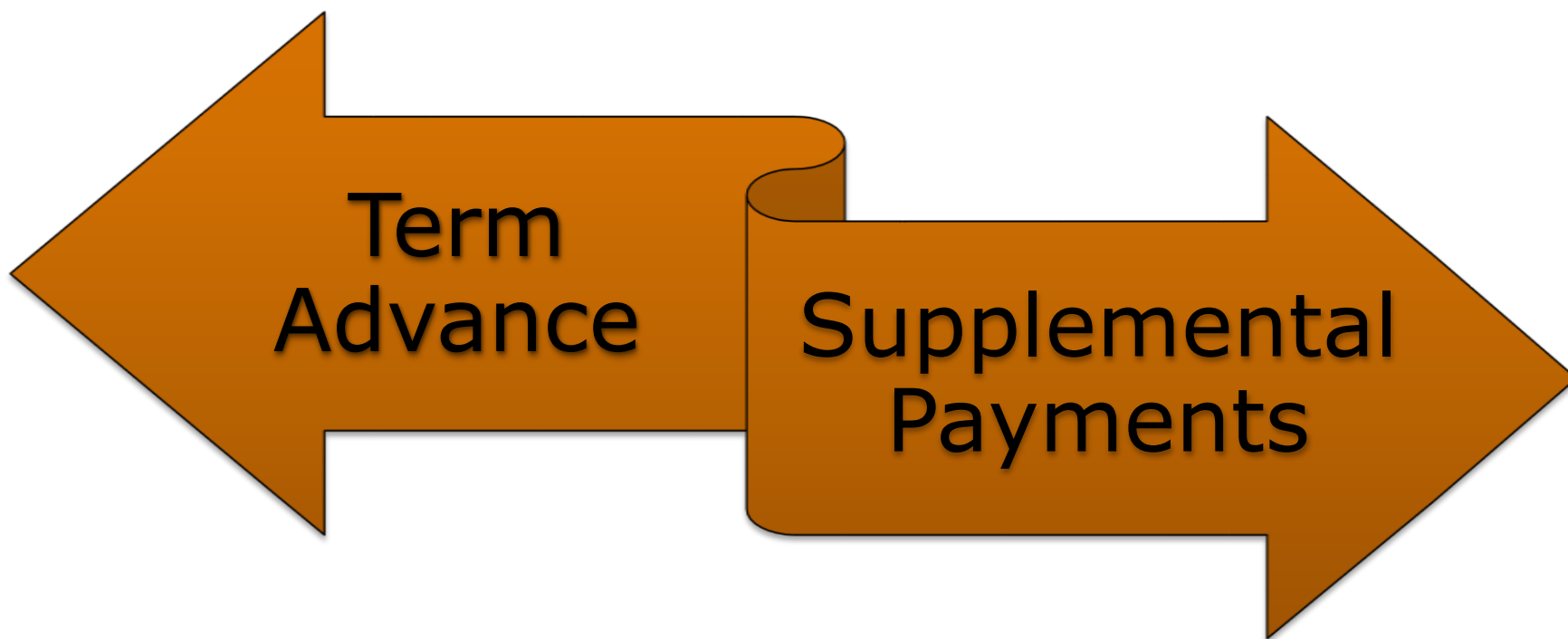


Disbursement of Funds

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Overview





Term Advance

- Sent to institutions at the start of each term
- Based on a percentage of previous year's reconciled term amount
- Currently, term advances are set at 95%
- Not all schools are eligible to receive advance
 - ❑ **New to Cal Grant program**
 - ❑ **Previously ineligible in prior year**
 - ❑ **At-risk schools**



Example: Term Advance

Term Advance Rate: 95%

- Spring 2016, City College reconciled \$150,000
 - $\$150,000 \times .95 = \$142,500$
- Spring 2017, the Commission sends a Term Advance of \$142,500





Supplemental Payments

Weekly process:

School's grant account is reconciled with the accepted payment transactions

Result:

If reconciled payments **exceed** the advance amount, supplemental payments are initiated

Example:

- City College Spring 2017 advance \$142,500
- City College posted payments total \$150,000
- Supplemental funds of \$7,500 will be sent



Reporting Payments

Making education beyond high school financially accessible to all Californians.



Reporting Payments

1. Directly on the Display Roster

- ✓ **Convenient**
- ✓ **Real-time. No waiting!**
- ✓ **Commonly used by smaller schools**

2. Upload Grant Roster Data File

- ✓ **Upload large number of students at once**
- ✓ **Import/export data using Financial Aid Management Systems (FAMS)**
- ✓ **File specifications in WebGrants under “Help”**



Display Roster

- Post payments
- Adjust payments
- Award details
- Student information
- Payment information
- Status messages

CSAC ID: View History Record: 12												
SSN	DOB	Grant ID	Cycle ID	Housing Code	Dep Status	New / Renewal	EL Code	CSAC Budget	EFC	Remain Elig	Forecast Elig	Roster Section
			E2	1	D	R	2	*****	*****	200.00%	100.00%	ELIGIBLE(1)
Custom Codes		1	2	3	4	5						
Fall Term				Adj Reason Codes				Pay Status Codes			Delete Txn	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type			
	Totals	\$10,754	\$5,377				62989	2016				
B	T/F	\$9,084	\$4,542	<input type="text" value="0"/>	<input type="text" value=""/>	RP			PAY			
B	ACSS	\$1,670	\$835	<input type="text" value="0"/>	<input type="text" value=""/>	RP			PAY			
Spring Term				Adj Reason Codes				Pay Status Codes			Delete Txn	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type			
	Totals	\$10,754	\$5,377			<input type="text" value=""/>	62989	2016				
B	T/F	\$9,084	\$4,542	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>			GRT			
B	ACSS	\$1,670	\$835	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>			GRT			



Grant Roster Data File

- Report payments using batch upload process

CALIFORNIA STUDENT AID COMMISSION GRANT PAYMENT SYSTEM CAL GRANT ROSTER ELECTRONIC RECORD LAYOUT				
GRANT ROSTER HEADER RECORD				
For assistance on technical submission issues, please call the CSAC Technology Help Desk at (888) 294-0148. For assistance on programmatic issues, please call CSAC School Support Services at (888) 294-0153.				
FIELD DESCRIPTION	LENGTH	MODE	POSITION	DEFAULT / VALID VALUES
Transaction Code	4	A/N	1-4	GPHD
Data Media	2	N	5-6	09 = Data Transfer Facility
Filler	6	A/N	7-12	Blank
Submitter Identification	8	A/N	13-20	Required USDE code number
Submitter Source Code	1	A/N	21-21	Required S = School
Submitter Name	32	A/N	22-53	Required School name
Processing Date	8	N	54-61	Required CCYYMMDD
Academic Year	4	N	62-65	Required YYYY
Filler	415	A/N	66-480	Blank

RecordLayout_GrantRoster.doc
Last layout change 04-01-13
Last edit descriptions 02/19/2014

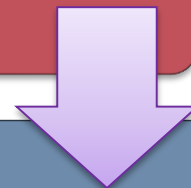
Page 1

MISSION GRANT PAYMENT SYSTEM CAL GRANT ROSTER ELECTRONIC RECORD LAYOUT		
GRANT ROSTER INPUT DETAIL RECORD		
MODE	POSITION	DEFAULT / VALID VALUES
A/N	1-4	Required GPHD
A/N	5-5	Required A = Add U = Update
A/N	6-7	Blank
A/N	8-16	Required First character will always be a C, E or G 0 - 9 for remaining characters
N	17-25	Required 001010001 - 999999999
A/N	26-26	Blank
A/N	27-45	Blank = no last name
A/N	46-56	Blank = no first name
A/N	57-57	Blank = no value reported
A/N	58-65	Required YYYYMMDD
66-66		Required A = Cal Grant A B = Cal Grant B C = Cal Grant C
67-74		Blank
75-75		1 = On campus housing 2 = Off campus housing 3 = With par/relatives
76-85		Blank
86-90		Optional 00000 - 99999 (dollars only, no cents) Right justify, zero fill Blank = default



Weekly Process

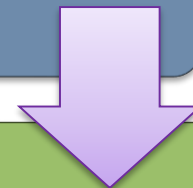
All accepted payments and adjustments are processed



Payment status code changed to:

AP = accepted payment

AA = accepted adjustment



AP and AA codes processed over weekend:

AP to **RP** = reconciled payment

AA to **RA** = reconciled adjustment



Payment/ Adjustment Codes

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Payment Codes

Code	Description	Resulting Action	Satisfy Renewal
PD	Reporting a full time payment for an eligible student	Eligibility used	Y
SC	Reporting a School Change	Student will be added to your school's roster	N
NA	Reporting students that are NOT in attendance at your school	Student will be moved to the "Not in Attendance" section; <i>Letter is generated to student</i>	N
YA	Reverses the NA; Reporting students that are in attendance at your school	Moving a student from the "Not in Attendance" section to the "Eligible" section of the roster	N
IT	Reporting transfer entitlement ineligibility; Only visible for BDGI schools	Award is withdrawn immediately; <i>Letter is generated to student</i>	N

Adjustment Reason Codes

Code	Description	Resulting Action	Satisfy Renewal
FT	Reporting a Full-time payment	Eligibility used	Y
TT	Reporting a Three-Quarter time payment	Eligibility used	Y
HT	Reporting a Half-time payment	Eligibility used	Y
LH	Reporting a Less than Half-time status, ineligible for payment this term	Uses leave eligibility; max 100% lifetime <i>Letter is generated to student</i>	Y
LA	Reporting a Leave of Absence, student may return	Uses leave eligibility; max 200% lifetime	Y

Adjustment Reason Codes

Code	Description	Resulting Action	Satisfy Renewal
OF	Recipient is receiving Outside Funding (Full-time)	If amount = \$0, no eligibility used.	Y
OH	Recipient is receiving Outside Funding (Half-time)	If amount = \$0, no eligibility used.	Y
OT	Recipient is receiving Outside Funding (Three-Quarter time)	If amount = \$0, no eligibility used.	Y
FI	Unable to report payment due to incomplete financial aid file	Award is withdrawn following year end reconciliation <i>Letter is generated to student</i>	N
IG	Ineligible for award due to invalid program length	Award is withdrawn immediately <i>Letter is generated to student</i>	N



Adjustment Reason Codes

Code	Description	Resulting Action	Satisfy Renewal
LD	Ineligible for award due to loan default/grant overpayment	Award is withdrawn immediately <i>Letter is generated to student</i>	N
TV	Ineligible for 5 th year benefits (Teacher Credential Program)	Award is withdrawn immediately <i>Letter is generated to student</i>	N
NP	Not maintaining Satisfactory Academic Progress (SAP)	Award withdrawn after 3 consecutive terms <i>Letter is generated to student</i>	Y
NS	Used to reverse a reported payment	No eligibility used	N
SR	Reporting last payment for a graduating senior	After payment posts, award is withdrawn immediately <i>Letter is generated to student</i>	N



A Closer Look

Let's take a closer look at some of the codes that cause the most confusion:

- ❑ LA = Leave of Absence
- ❑ FI = File Incomplete
- ❑ IG = Ineligible for Grant





When Schools should Report Leave of Absence

Yes...

- Student is on an approved leave from school
- When new Cal Grant recipient starts attending for WN or SP, and has no transaction for FL
- Student does not want to receive payment

No...

- If student does not meet SAP
- If student has not complied with verification requests
- Student has no unmet need



File Incomplete

- FI code for File Incomplete is used when
 - A student is in attendance at your school but missing documentations per payment
- Who should report?
 - School
- Comment:
 - When reporting FI, cannot change to a pay code only adjustment code
 - Students with FI will be withdrawn at the end of year



Ineligible for Grant

- IG code for Ineligible for Grant is used for
 - When a student is in an ineligible program
 - Ex: A Cal Grant C recipient who is not enrolled in a vocational, occupational, or technical courses but instead in general education
- Who should report?
 - School
- Comment: this code should only be used for its purpose of ineligible programs. Usage of code will withdraw a students award.



Limited Eligibility

Divide the recipient's remaining eligibility by the percentage of eligibility associated with full-time enrollment status for the term. Multiply the resulting ratio by the recipient's prorated term award amount based on attendance. Carry out all calculations to five decimal places to assure amount matches the Commission calculated amount.

Example:

Access Costs - A recipient with 16.67% remaining eligibility attends three- quarter time at a community college with a 2 semester academic year. The recipient's full time term award amount is \$828.

$16.67\% \div 50\% = .3334$ (limited eligibility ratio)

$\$828 \times .3334 = \276 (limited eligibility term payment amount)

Payment Policy

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Payment, Adjustment, and Refund Policy

- General Rules:
 - Student enrollment status is locked in at census for payment
 - Payments should be disbursed based on:
 - Enrollment status at census date or its equivalent
 - The institution is required to establish and maintain a written refund policy that includes the Cal Grant Program. In the case of a refund (i.e., if a recipient withdraws, drops out or is expelled for a term for which a payment is made), the policy should specify how the institution calculates the refund based upon the institution's refund policy and how it determines the portion to be returned to the Commission on behalf of the State.



Payment Timeframes

Initial Payment Made...	Payment Based On...
Before Census	Current Enrollment Status*
At Census	Enrollment Status at Census
After Census	Enrollment Status at Census
After Census (late add to roster)**	Enrollment Status at Time of Disbursement
After Completed Term	Enrollment Status at Time of Completed Term

*Adjustment may be needed at census if student enrollment status changed

**Situation occurs due to extenuating circumstance



Repeat Courses

- Student may receive payment for any repetition of a course as long as it has never been passed
- Once a course is passed, the student may receive payment for only one retaking of that course
- <https://www2.ed.gov/policy/highered/reg/hearulemaking/2009/course.html>



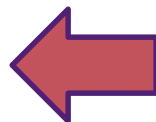
WebGrants Reports

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Accept/Reject

Displays Failed
transactions



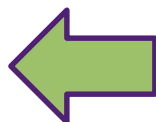
1 SABRAR2 - 01 (EDE COPY)		CALIFORNIA STUDENT AID COMMISSION										PAGE : 1		
		ACCEPT/REJECT REPORT										RUN DATE: 10/28/2011		
		ACADEMIC YEAR 2011										RUN TIME: 22:55:36		
REJECTED SECTION		00111100 - ALLAN HANCOCK COLLEGE												

GRANT ID#	SSN	STUDENT LASTNAME	FIRST NAME	M I	PROCESS DATE	SRC CODE	ACT CODE	PGM CODE	NEED NEED	ADJ TYPE	PAY TYPE	AMOUNT	RSN	PAY STATUS

		GONZALEZ	ELIDA		10/28/2011	C	U		0	ACC	FL	776.00		PD
6785: PAY TYPE ACC: SCHOOL HAS ALREADY REPORTED PAYMENT														
		RODRIGUEZ	RODRIGUEZ		10/28/2011	C	U	C	0	B&S	FL	288.00		PD
6785: PAY TYPE B&S: SCHOOL HAS ALREADY REPORTED PAYMENT														
		JOSE	JOSE	A	10/28/2011	C	U	B	0	ACC	FL	776.00		PD
6785: PAY TYPE ACC: SCHOOL HAS ALREADY REPORTED PAYMENT														

TOTALS														
BATCH -		PAYMENTS REJECTED:		0		AMOUNT REJECTED:		0.00						
ONLINE -		PAYMENTS REJECTED:				AMOUNT REJECTED:								
COMBINED -		PAYMENTS COMBINED:				AMOUNT COMBINED:								

Provides
confirmation for
each transaction
submitted



1SABRAR2 - 01 (EDE COPY)		CALIFORNIA STUDENT AID COMMISSION										PAGE : 2		
		ACCEPT/REJECT REPORT										RUN DATE: 10/28/2011		
		ACADEMIC YEAR 2011										RUN TIME: 22:55:36		
ACCEPTED SECTION		00111100 - ALLAN HANCOCK COLLEGE												
GRANT ID#	SSN	STUDENT LASTNAME	FIRST NAME	M I	PROCESS DATE	SRC CODE	ACT CODE	PGM CODE	NEED NEED	ADJ TYPE	PAY TYPE	AMOUNT	RSN	PAY STATUS
		ACEVEDO	AMALIA		10/28/2011	C	U	B	18498	0	B+S	FL	216.00	TT
		ACEVEDO	WILMAIDO		10/28/2011	C	U	B	0	0	ACC	FL	776.00	PD
		ACEVES	WILMAIDO	V	10/28/2011	C	U	B	9389	0	ACC	FL	388.00	HT
		ACEVES	RICARDO		10/28/2011	C	U	B	0	0	ACC	FL	776.00	PD
		AGUILAR	JEANETTE		10/28/2011	C	U	B	0	0	ACC	FL	776.00	PD
		AGUILERA	ANA	J	10/28/2011	C	U	B	0	0	ACC	FL	776.00	PD
		ALBARRANSALINAS	MARIA	G	10/28/2011	C	U	C	0	0	B+S	FL	288.00	PD
		ALBRIGHT	MEGAN	R	10/28/2011	C	U	B	0	0	ACC	FL	776.00	PD



Monthly Payment Activity

- Reconciled Payments (RA)
- Reconciled Adjustments (RA)
- Year-To-Date activity by term and type

1 SABRMPA1 - 01		CALIFORNIA STUDENT AID COMMISSION		PAGE NO: 1
		PAYMENT ACTIVITY REPORT		RUN DATE: 11/19/2011
		ACCOUNTING SUMMARY		RUN TIME: 03:40:30
		ACADEMIC YEAR 2011		
		00111100 - ALLAN HANCOCK COLLEGE		
DATE	ACTIVITY	FUNDS DISBURSED TO INSTITUTION	PAYMENT TRANSACTIONS	BALANCE
----	-----	-----	-----	-----
08-23-11	FALL ADVANCE	141,653.00		141,653.00
08-26-11	FALL RECONCILED PAYMENT TRANSACTIONS		0.00	141,653.00
09-02-11	FALL RECONCILED PAYMENT TRANSACTIONS		0.00	141,653.00
10-07-11	FALL RECONCILED PAYMENT TRANSACTIONS		0.00	141,653.00
10-28-11	FALL RECONCILED PAYMENT TRANSACTIONS		260,346.00	-118,693.00
10-28-11	RECONCILED PAYMENT TO INSTITUTION	118,693.00		0.00
11-04-11	FALL RECONCILED PAYMENT TRANSACTIONS		704.00	-704.00
11-04-11	RECONCILED PAYMENT TO INSTITUTION	704.00		0.00
11-18-11	FALL RECONCILED PAYMENT TRANSACTIONS		1,374.00	-1,374.00
11-18-11	RECONCILED PAYMENT TO INSTITUTION	1,374.00		0.00
	TOTAL FUNDS DISBURSED / TOTAL PAYMENTS	262,424.00	262,424.00	

	YEAR-TO-DATE ACTIVITY					TOTAL
	FALL	WINTER	SPRING	SUMMER		
CAT/F	0.00	0.00	0.00	0.00	0.00	0.00
CBT/F	0.00	0.00	0.00	0.00	0.00	0.00
CBACC	255,692.00	0.00	0.00	0.00	0.00	255,692.00
CBTOTAL	255,692.00	0.00	0.00	0.00	0.00	255,692.00
CCT/F	0.00	0.00	0.00	0.00	0.00	0.00
CCB/S	6,732.00	0.00	0.00	0.00	0.00	6,732.00
CCTOTAL	6,732.00	0.00	0.00	0.00	0.00	6,732.00
GFT/F	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL	262,424.00	0.00	0.00	0.00	0.00	
GRAND TOTAL						262,424.00

Making education beyond high school financially accessible to all Californians.

Common Payment Scenarios

Making education beyond high school financially accessible to all Californians.

What If...?

A student has other awards or scholarships that don't allow a Cal Grant payment for the term?

Answer: Use the "O" codes: OF, OT and OH

Comment: The "O" codes can be used to adjust the students payment amount if not eligible for FULL payment due to outside funding.

Fall Term				Adj Reason Codes				Pay Status	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type
	Totals	\$1,648	\$824			▼	11827	2014	
B	ACSS	\$1,648	\$824		▼	▼			GRT
Spring Term				Adj Reason Codes				Pay Status	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type
	Totals	\$1,648	\$824			▼	11827	2014	
B	ACSS	\$1,648	\$824			▼			GRT

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What If...?

The student had a payment reported for a term but I need to back that payment out?

Answer: You use the "NS" code with a \$0 adjustment amount

Comment: The student did not attend for the reported term or payment was made in error.

Fall Term				Adi Reason Codes				Pay Status	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type
	Totals	\$1,648	\$824			▼	11827	2014	
B	ACSS	\$1,648	\$824		▼	▼			GRT
Spring Term				Adi Reason Codes				Pay Status	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type
	Totals	\$1,648	\$824			▼	11827	2014	
B	ACSS	\$1,648	\$824			▼			GRT

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What If...?

I just reported the student's last Cal Grant payment (student is now withdrawn), but I need to make an adjustment to the payment?

Answer: Call School Support unit to get the award reinstated

Comment: Once reinstated, you can immediately go to the roster and make the necessary adjustment.





What If...?

I want to remove a non-enrolled student from the roster?

Answer: Use the "NA" Payment Status code

Comments: This moves the student record to the ineligible section of the roster, but he/she will still be on roster for the rest of the AY or until school change is reported.

To bring them back, use "YA"

Fall Term				Adj Reason Codes				Pay Status	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type
	Totals	\$1,648	\$824				11827	2014	
B	ACSS	\$1,648	\$824			PD			GRT
						NA			
Spring Term				Adj Reason Codes				Pay Status	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type
	Totals	\$1,648	\$824				11827	2014	
B	ACSS	\$1,648	\$824						GRT



What If...?

A student is enrolled at our school,
but is attending less than half
time?

**Answer: Report “LH” and \$0
payment**

Comment: The student will receive
a notification to inform him/her
that they are not eligible for a
disbursement and if they wish to
receive their disbursement, they
must increase enrollment.

Fall Term				Adi Reason Codes				Pay Status	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type
	Totals	\$1,648	\$824			▼	11827	2014	
B	ACSS	\$1,648	\$824		▼	▼			GRT
Spring Term				Adi Reason Codes				Pay Status	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type
	Totals	\$1,648	\$824			▼	11827	2014	
B	ACSS	\$1,648	\$824		▼	▼			GRT

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What If...?

A student graduated
before the first
disbursement date?

**Answer: Report "SR"
and \$0 payment**

**Comment: The student
will receive a
withdrawal notification
for graduating.**

Fall Term				Adi Reason Codes				Pay Status	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type
	Totals	\$1,648	\$824			▼	11827	2014	
B	ACSS	\$1,648	\$824		▼	▼			GRT
Spring Term				Adi Reason Codes				Pay Status	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type
	Totals	\$1,648	\$824			▼	11827	2014	
B	ACSS	\$1,648	\$824			▼			GRT

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What If...?

A student selected for verification cannot yet receive their Cal Grant disbursement because they haven't provided their tax transcripts?

Answer: Report "FI" and \$0 payment

Comment: The student will receive a notification directing them to the financial aid office to complete necessary documents/documentation.

Fall Term				Adi Reason Codes				Pay Status	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type
	Totals	\$1,648	\$824			▼	11827	2014	
B	ACSS	\$1,648	\$824		▼	▼			GRT
Spring Term				Adi Reason Codes				Pay Status	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type
	Totals	\$1,648	\$824			▼	11827	2014	
B	ACSS	\$1,648	\$824		▼	▼			GRT

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What If...?

I reported a Full-Time payment for a student, but need adjust to Three-Quarter time instead?

Answer: Replace the FT code with the TT code. The dollar amount should automatically change to the Three-Quarter time amount

Comment: If the amount does not automatically update, you can manually enter the dollar amount in the Adjustment Amount field.

Fall Term				Adj Reason Codes				Pay Status	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type
	Totals	\$1,648	\$824				11827		
B	ACSS	\$1,648	\$824	0		RP			PAY

Spring Term				Adj Reason Codes				Pay Status	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type
	Totals	\$1,648	\$824				11827		
B	ACSS	\$1,648	\$824						GRT

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What If...?

Another school reported an FI for a student, but the student is attending my campus. I need to report a payment.

Answer: Contact other school to remove FI

Comment: Call School Support





What If...?

My student is awarded a Cal Grant C but is not enrolled in a technical/vocational program?

Answer: Report "IG"

Comment: The student's award is withdrawn immediately. IG should only be used for program length ineligibility.

Fall Term				Adj Reason Codes				Pay Status	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type
	Totals	\$1,648	\$824			▼	11827	2014	
B	ACSS	\$1,648	\$824		▼	▼			GRT
Spring Term				Adj Reason Codes				Pay Status	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type
	Totals	\$1,648	\$824			▼	11827	2014	
B	ACSS	\$1,648	\$824			▼			GRT

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What If...?

At census, my student was enrolled full-time and payment was reported in WebGrants. After census, my student's enrollment dropped to three-quarter time. Is a payment adjustment required?

Answer: No payment adjustment is required. The student was paid on or before the census date and therefore they are entitled to the full-time award amount.

Fall Term				Adj Reason Codes				Pay Statu	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type
	Totals	\$1,648	\$824				11827		
B	ACSS	\$1,648	\$824	0	▼	RP			PAY
Spring Term				Adj Reason Codes				Pay Statu	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type
	Totals	\$1,648	\$824			▼	11827		
B	ACSS	\$1,648	\$824		▼	▼			GRT



What If...?

My student was enrolled full-time at the start of the term and I reported a full-time payment in WebGrants. My student subsequently dropped to three quarter time at census. Is a payment adjustment required?

Answer: Yes, a payment adjustment is required to reflect their enrollment status of three quarter time at census.

Fall Term				Adj Reason Codes				Pay Status	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type
	Totals	\$1,648	\$824				11827		
B	ACSS	\$1,648	\$824	0		RP			PAY
Spring Term				Adj Reason Codes				Pay Status	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type
	Totals	\$1,648	\$824				11827		
B	ACSS	\$1,648	\$824						GRT

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What If...?

My student was enrolled full-time for the Fall term but did not appear on my roster until the Spring term. Can I still pay the student for the Fall term?

Answer: Yes, the student should be paid according to the number of units they completed during the Fall term.

Comment: This is considered a retroactive payment.

Fall Term				Adj Reason Codes			Pay Status		
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type
	Totals	\$1,648	\$824				11827		
B	ACSS	\$1,648	\$824	0		RP			PAY
Spring Term				Adj	Codes			Pay Status	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	FI	Pay Code	Annual Need	Income & Asset Year Used	Rec Type
	Totals	\$1,648	\$824		HT		11827		
B	ACSS	\$1,648	\$824		IG				GRT
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What If...?

My student was enrolled full-time at census. My student subsequently dropped to half time status and was added to my roster after census. What do I pay the student?

Answer: At the time of disbursement, the student is enrolled at half time status and is only eligible for a half time payment.

Comment: For any extenuating circumstances after census, payment should be based on the student's status at the time of disbursement.

Fall Term				Adi Reason Codes				Pay Status	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type
	Totals	\$1,648	\$824			▼	11827	2014	
B	ACSS	\$1,648	\$824		▼	▼			GRT
Spring Term				Adi Codes				Pay Status	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount		Pay Code	Annual Need	Income & Asset Year Used	Rec Type
	Totals	\$1,648	\$824			▼	11827	2014	
B	ACSS	\$1,648	\$824			▼			GRT

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What If..?

My student has 16.67% remaining eligibility and is attending half-time for the fall. Should I pay the remaining eligibility or half of the 16.67%?

Answer: You should pay the student the 16.67% remaining eligibility as long as the T/F does not exceed the actual tuition assessment.

Fall Term				Adi Reason Codes				Pay Status	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount	Adj Reason	Pay Code	Annual Need	Income & Asset Year Used	Rec Type
	Totals	\$1,648	\$824			▼	11827	2014	
B	ACSS	\$1,648	\$824		▼	▼			GRT
Spring Term				Adi Codes				Pay Status	
Program Code	Award Type	Annual Award	Term Amount	Adj Amount		Pay Code	Annual Need	Income & Asset Year Used	Rec Type
	Totals	\$1,648	\$824			▼	11827	2014	
B	ACSS	\$1,648	\$824			▼			GRT

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Key Points

- ✓ Report timely payments
- ✓ Make appropriate adjustments
- ✓ Call School Support for assistance



Reconciliation

Making education beyond high school financially accessible to all Californians.



What is Reconciliation?

- Verification that all Cal Grant funds have been disbursed to each student in the correct amounts
- Confirmation that all payments have been properly reported to the Commission





Payment Period Reconciliation

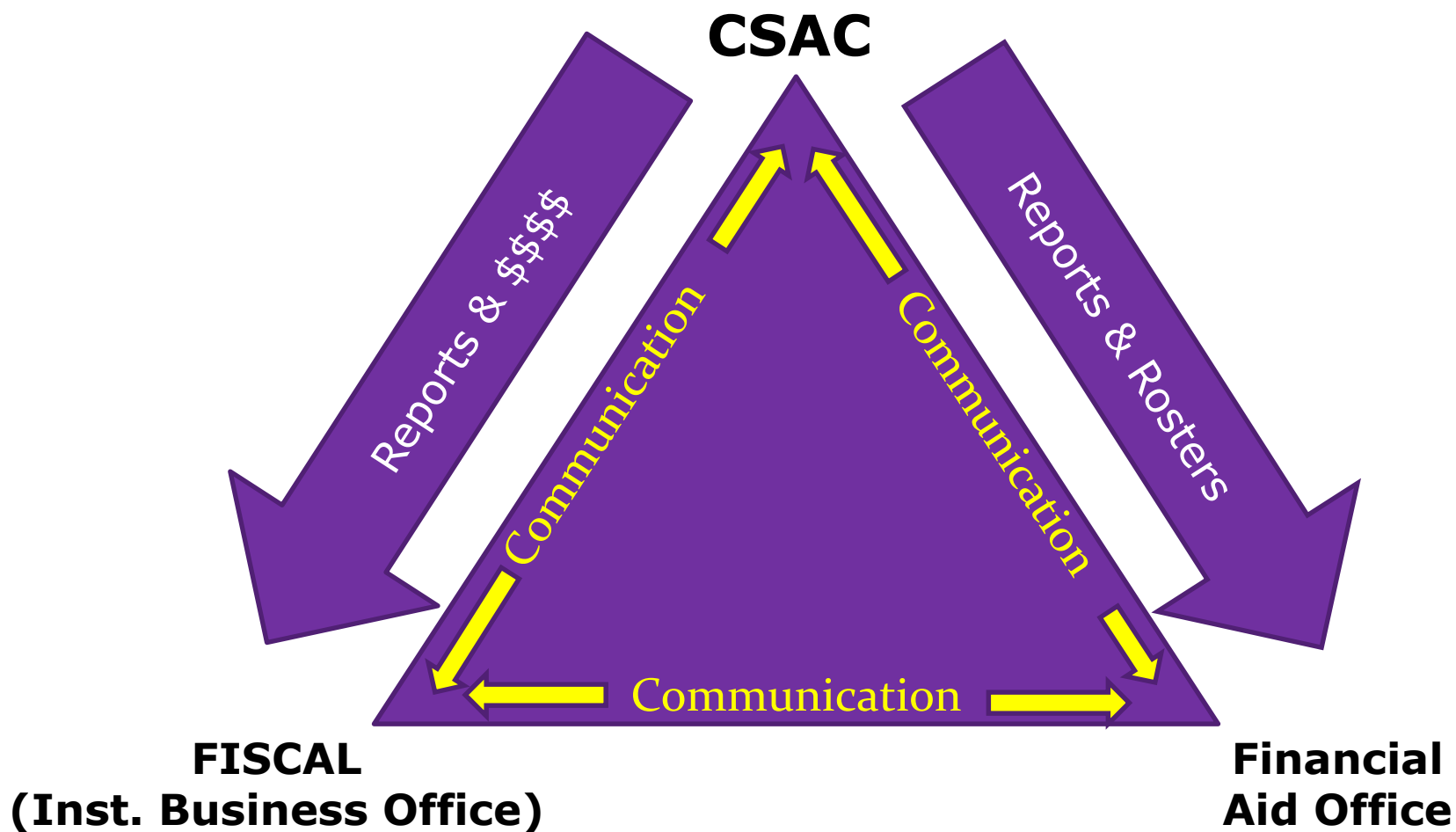
Per the 2017-21 Institutional Participation Agreement:

"Institutions are required to reconcile payments no later than 60 calendar days after the end of the payment period."

"Reconciliation does not preclude adjustments or payments after that date."



What is Reconciliation?



Making education beyond high school financially accessible to all Californians.



Reconciliation Timeline

<u>Month</u>	<u>Description</u>
August 2016– June 2017	Payment Period
July 2017 – September 2017	Correction period
September 14, 2017	Final Reconciliation
Late September 2017	Invoicing for excess funds
October 2017	Beginning of penalty letters



4 Steps to Accurate Reconciliation



Making education beyond high school financially accessible to all Californians.

4 Steps to Accurate Reconciliation

1. Account for funds received from CSAC
2. Verify accuracy of disbursement amounts for each student
3. Ensure that payment and student statuses are reported to the Commission correctly
4. Ensure that any remaining funds are returned to the Commission after Final Reconciliation



Step 1

Account for funds
received from CSAC





Account for Funds Received

- Check with Business Office
- Check Monthly Payment Activity Report
- If any questions about Electronic Funds Transfer (EFT), contact the Commission





Supplemental Payments

- Check for reconciled payments or adjustments (RP/RA) on a weekly basis
- Deduct all RP/RA from running Cal Grant balance
- When all Cal Grant funds are exhausted:
 - Supplemental Funds sent automatically via EFT or warrant to institution
 - Supplemental payments appears on the next Monthly Payment Activity Report



Step 2

Verify Accuracy of
Disbursement
Amounts for Each
Student





Reconciliation Example

Payments Reported to CSAC

For month of February 2016

Jim Otto	\$775
Shane Lechler	\$4,416
Rich Gannon	\$775
Tim Brown	\$5,191
Marcus Allen	\$4,416

Total	\$15,573
-------	----------

Payments Disbursed to Students

For month of February 2016

Jim Otto	\$775
Shane Lechler	\$4,416
Rich Gannon	\$775
Tim Brown	\$775
Marcus Allen	\$4,416
Gene Upshaw	\$4,416

Total	\$15,573
-------	----------



Reconciliation Example

Payments Reported to CSAC

For month of February 2016

Jim Otto	\$775
Shane Lechler	\$4,416
Rich Gannon	\$775
Tim Brown	\$5,191
Marcus Allen	\$4,416
<i>Gene Upshaw</i>	<i>\$4,416</i>

Total	\$19,989
-------	----------

Payments Disbursed to Students

For month of February 2016

Jim Otto	\$775
Shane Lechler	\$4,416
Rich Gannon	\$775
Tim Brown	\$775
Marcus Allen	\$4,416
Gene Upshaw	\$4,416

Total	\$15,573
-------	----------



Reconciliation Example

Payments Reported to CSAC

For month of February 2016

Jim Otto	\$775
Shane Lechler	\$4,416
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Gene Upshaw	\$4,416

Total	\$19,989
-------	----------

Payments Disbursed to Students

For month of February 2016

Jim Otto	\$775
Shane Lechler	\$4,416
Rich Gannon	\$775
Tim Brown	\$5,191
Marcus Allen	\$4,416
Gene Upshaw	\$4,416

Total	\$19,989
-------	----------



Create a Summary Report

Display Reconciliation

- ◆ Select either Report or Data file from Display Type. For Report, selecting **Detail** will produce student level information; **Summary** will provide totals. You may select either or both of the **Report** boxes.
- ◆ Reports will display in a text file format. They can be printed using your Web browser.
- ◆ Data Files will display in a text file format and may be saved to your computer. The Tools Menu contains a program that will format the data file using Excel.
- ◆ If you are using Netscape, select the Display/Download link to view. Then use your browser **Save** option to download.

Display Type: Detail Report ☐ Summary Report ☒ Detail Data ☐

School ID = Acad Year = 2017-2018 Format = CSAC Standard Reconciliation

Basic Report Filter for CSAC Standard Format Only

The purpose of this secondary filter is to provide schools with a basic reconciliation tool. After viewing the Reconciliation Summary and identifying areas of discrepancy, schools can use the filter options below to obtain student level data for each summary subtotal.

- ◆ Select the combination of Term, Program Code and Award Type that matches the subtotal or total you are trying to verify. (For more complex filters, use the Customize feature.)

Basic Report Filter: Term Program Code Award Type



Reconciliation Report (Summary)

FILTER CRITERIA : PAY STAT CODE IN ('RA','RP','AA','AP') AND TERM (FL,WN,SP,SU)
INFORMATION FOR TERMS NOT SELECTED WILL DISPLAY AS BLANKS

	FALL	WINTER	SPRING	SUMMER	TOTAL
A T/F	21,562,647.00	21,112,303.00	20,547,056.00		63,222,006.00
B T/F	8,661,966.00	8,226,543.00	7,877,858.00		24,766,367.00
B ACC	1,124,881.00	1,079,980.00	1,027,295.00		3,232,156.00
B TOTAL	9,786,847.00	9,306,523.00	8,905,153.00	0.00	27,998,523.00
C T/F	1,728.00	1,728.00	1,728.00		5,184.00
C B/S	384.00	384.00	384.00		1,152.00
C TOTAL	2,112.00	2,112.00	2,112.00	0.00	6,336.00

TOTAL	31,351,606.00	30,420,938.00	29,454,321.00	0.00	
GRAND TOTAL					91,226,865.00

FILTER CRITERIA : PAY STAT CODE IN ('RA','RP','AA','AP') AND TERM (FL,WN,SP,SU)
 INFORMATION FOR TERMS NOT SELECTED WILL DISPLAY AS BLANKS

	FALL	WINTER	SPRING	SUMMER	TOTAL
A T/F	4,552.00		2,427.00	0.00	6,979.00
B T/F	25,484.00		30,338.00	13,349.00	69,171.00
B ACC	4,069.00		4,844.00	2,134.00	11,047.00
B TOTAL	29,553.00	0.00	35,182.00	15,483.00	80,218.00
C T/F					0.00
C B/S					0.00
C TOTAL	0.00	0.00	0.00	0.00	0.00
TOTAL	34,105.00	0.00	37,609.00	15,483.00	87,197.00
GRAND TOTAL					

Accounting Report 2014-15 Cal Grant Disbursements

Cal Grant A: \$ 6,979

Cal Grant B: \$79,443

Total: \$86,422

Accounting Report 2014-15 Cal Grant B Disbursements

Fall: \$29,553

Spring: \$34,407

Total: \$79,433

Accounting Report 2014-15 Cal Grant B Spring Disbursements

Tuition & Fees: \$30,338

Access: \$ 4,069

Total: \$34,407



Create a Detailed Report

Display Type: **Detail Report** ☒ Summary Report ☐ Detail Data ☐

School ID = Acad Year = 2016-2017 ▼ Format = CSAC Standard Reconciliation ▼ **GO!**

Basic Report Filter for CSAC Standard Format Only

The purpose of this secondary filter is to provide schools with a basic reconciliation tool. After viewing the Reconciliation Summary and identifying areas of discrepancy, schools can use the filter options below to obtain student level data for each summary subtotal.

- ✦ Select the combination of Term, Program Code and Award Type that matches the subtotal or total you are trying to verify. (For more complex filters, use the Customize feature.)

Basic Report Filter: Term ▼ Program Code ▼ Award Type ▼ **GO!**



Reconciliation Report (Detail)

RECONCILIATION REPORT (DETAIL)
00111100 - ALLAN HANCOCK COLLEGE

FILTER CRITERIA : PAY STAT CODE IN ('RA','RP','AA','AP') AND
SORT CRITERIA : SSN ASCENDING , TERM ASCENDING , AWARD TYPE
DATES SHOWN IN THIS REPORT ARE IN MMDDYY FORMAT

LAST NAME	FIRST NAME (10 Char)	ADJ RSN	DISB AMT	ELIG USED	CREATE DATE	PAY DATE
POOH	WINNIE T.	HT	388	25.00	032112	033012
			388			
LIGHTYEAR	BUZZ	TT	581	37.50	032212	032312
			581			
MCQUEEN	LIGHTENING	HT	388	25.00	032212	032312
			388			
WHITE	SNOW	TT	581	37.50	032212	032312
			581			
MOUSE	MICKEY		775	50.00	032212	032312
			775			
DUCK	DONALD		775	50.00	032212	032312
			775			
HOOD	ROBIN	HT	388	25.00	032212	032312
			388			
SMITH	JOHN		775	50.00	032112	032312
			775			
ROBIN	CHRISTOPHER		775	50.00	032212	032312

Accounting Report
2016-17 Cal Grant B
Spring Disbursements

Pooh, W \$388

Lightyear, B \$581

McQueen, L \$388

White, S \$581

Mouse, M \$775

Hood, R \$388

Smith, J \$775

Robin, C \$775



Step 3

Ensure Payment and
Student Statuses
were Reported
Correctly





Ensure Payment & Statuses are Reported

- Report changes to Commission
 - Adjust payments for attendance status
 - Half Time (HT)
 - Three Quarter Time (TT)
- Adjust tuition awards for students who withdraw from the institution
- Watch for limited eligibility situations





Common Reporting Errors

- Reporting a payment for a student who is not in attendance at your school
- Reporting a transaction or making a school change for an incorrect award year
- Reporting incorrect dollar amount for part time students



Common Reporting Errors

- Using the incorrect adjustment reason code.
 - ❑ LA- Leave of Absence
 - ❑ FI- File Incomplete
 - ❑ NP- Student not maintaining SAP
 - ❑ OF, OH, OT- Student's T/F are being paid by outside source
 - ❑ IG- Ineligible Program

The background of the slide is a stylized illustration of a desk. It features a clipboard with a checklist (one item is marked with a red 'X'), a red coffee cup, a pencil, and a pair of glasses. A large, semi-transparent purple rectangle is centered over the desk, containing the text for Step 4.

Step 4

Ensure That
Remaining Funds are
Returned to
Commission



Final Reconciliation



- September following the award year
- All roster payment adjustments and corrections should be done prior to September 14th
- Excess funds must be returned to the Commission
 - ☐ May not be applied to any other student
 - ☐ May not be carried over to next award year
- Invoices sent to institutions in late September and are due within 30 days
- Any dispute regarding invoice will not be reviewed until invoice is paid in full



Returning funds for a Closed Academic Year

- Submitted via check made out to the California Student Aid Commission
- Include a letter of explanation that contains the following information:
 - ❑ Student Name
 - ❑ CSAC ID Number
 - ❑ Term for which funds are bring returned
 - ❑ Amount
 - ❑ Contact information



Best Practices

Do's

- ✓ Make adjustments in WebGrants
- ✓ Check reports (i.e. MPA, Accept/Reject)
- ✓ Send check upon receipt of invoice at close of academic year
- ✓ Attach proper documentation with refunds
- ✓ Train new staff



Don'ts

- ✗ DON'T send refund checks during open academic year
- ✗ DON'T forget to reconcile timely
- ✗ DON'T pay all students at FT at the beginning of the term

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California Student Aid Commission

Compliance Reviews





Audit Objective

- To ensure program compliance by postsecondary institutions participating in the Commission's Cal Grant Programs.
- To evaluate and report on the institution's administration of Commission programs.



Audit Criteria

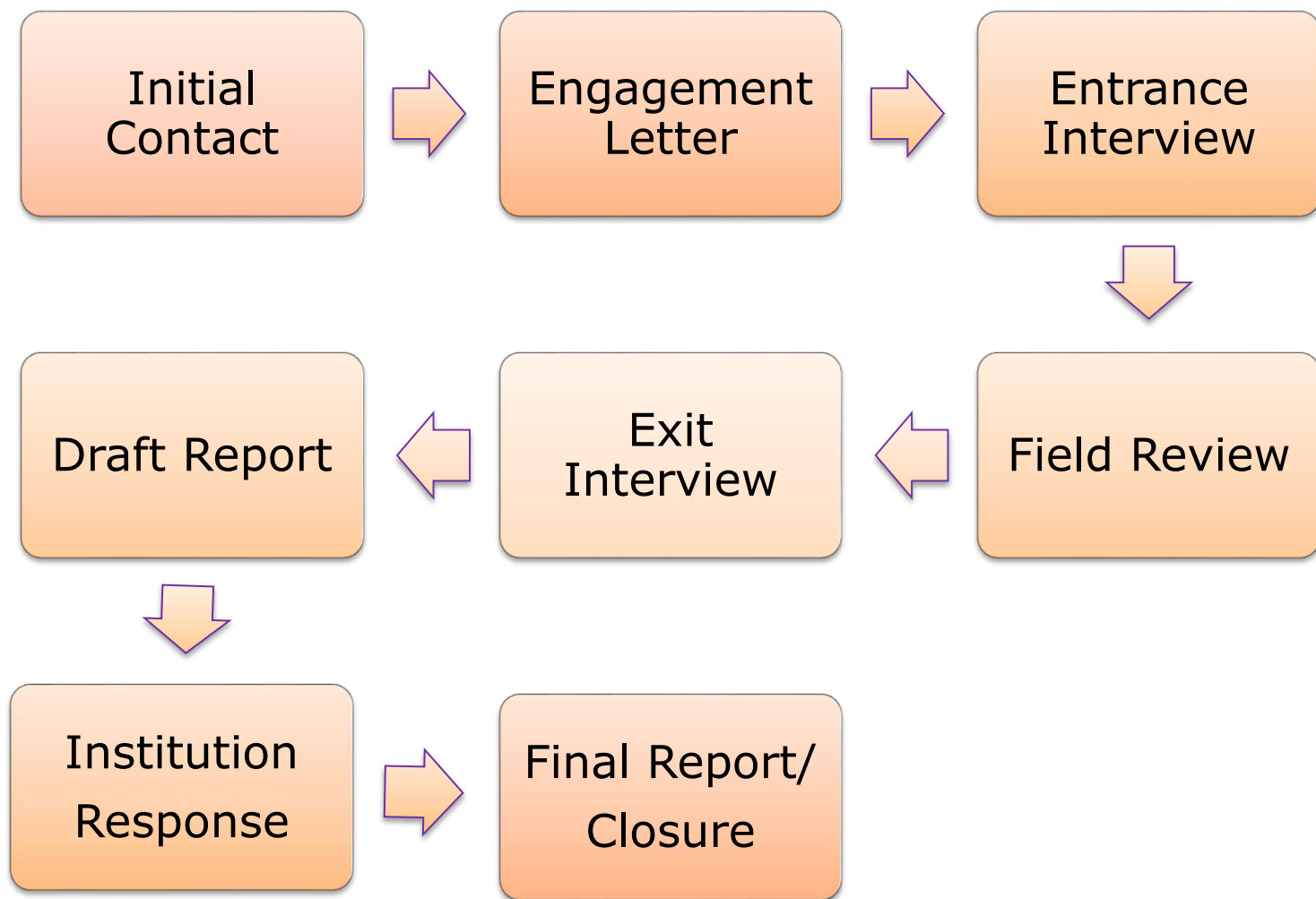
Issues that arise during the audit will be resolved by reference to:

- California Education Code
- California Code of Regulations
- Institutional Participation Agreement
- Cal Grant Manual/Handbook
- Commission Operations Memos and Special Alerts
- Higher Education Act of 1965, as amended
- 34 CFR: Compilation of Student Financial Assistance Regulations
- Financial Aid Handbook
- School Policies, Procedures and Catalogs

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The Review Process





Areas of Review

- General Eligibility
- Applicant Eligibility
- Fund Disbursement and Refunds
- Fiscal Responsibility



General Eligibility

- School's Policies and Procedures
- Cal Grant Institutional Participation Agreement
- Fiscal Operations Report and Application to Participate (FISAP)
- Independent Auditor's Report
- Educational Programs
- Information Security and Confidentiality Agreement



Applicant Eligibility

- Citizenship Requirements
- U.S. Selective Service Requirements
- Not in Default
- California Residency
- Enrolled in Eligible Program
- Does not Have Bachelor's or Professional Degree
- Education Level (EL)
- Income/Asset Does not Exceed Ceilings
- Demonstrates Need for the Award (Over-awards)
- Meeting Satisfactory Academic Progress
- Valid Institutional Student Information Record (ISIR)



Fund Disbursements and Refunds

- Enrollment Status - Number of Units
- Disbursement Policy & Dates
- Refund Policy
- Cal Grant Tuition Awards May Not Exceed Actual Tuition Charges
- Authorization – Cal Grant B Access and Cal Grant C Book & Supply Awards



Fiscal Responsibility

- Cal Grant Reconciliation (student by student)
- Accounting Documents – Ledgers (Receipt of Cal Grant Funds and Disbursements to Students)
- Reconciliation Discrepancies (excess funds, unreported payment, undisbursed funds)
- Cal Grant Funds Maintained in an Interest Bearing Account
- Return of Interest Earned on Cal Grant Funds



Audit Findings and Reporting

- Exit Conference–Summary of Finding and Observation Results
- Management Representation Letter
- Draft Report
- Institutional Audit Response to Draft Report
- Final Report



Corrective Measures

- Policy or procedural changes to ensure appropriate administration as it relates to the finding
- Return of ineligible funds as a result of an audit finding
- Portfolio review, if the error ratio exceeds 10%
- Complete training as it relates to the finding (repeat finding)
- Placement of the school in the Commission's At-Risk Reimbursement Program
- Withhold or stop term advances
- Terminate the institution's Agreement

Top 10 Most Common Findings

1. Cal Grant Reconciliation
2. Education Grade Level Verified Incorrectly
3. No Written Policies & Procedures
4. SAP Not in Compliance with Title IV
5. Noncompliance with Information Security and Confidentiality Agreement
6. Ineligible Student/Program
7. Income/Assets Exceed Ceiling
8. Incorrect Payment Amounts Due To Enrollment Status
9. Cal Grant Tuition Disbursement Exceeds Tuition Charges
10. Conflicting Information Not Resolved or Not Documented

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Ineligible Program For Cal Grant Type

Observation: A review of 17 Cal Grant A recipient files revealed 7 cases in which the institution disbursed Cal Grant A funds to students who were not enrolled in an eligible Cal Grant A program.

Requirement: Each type of Cal Grant (A, B or C) has specific program lengths and types of degrees, certificates or diploma a student must obtain. The school must obtain the student's degree objective at the time of enrollment.

Required Action: Return the ineligible funds, have the student withdrawn from the Cal Grant program and submit written procedures and quality controls measures that will be put into place to ensure the Cal Grant recipient is enrolled in an eligible program of study that clearly declares their educational objective at the start of enrollment and/or award year.

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Ineligible Program Example

Carol enrolled in the Medical Assistant program which is 1-year in program length. At the conclusion of her program she will receive a certificate.

She was awarded a Cal Grant A in the amount of \$9,708 and the school credited the funds towards her account. Because Carol was not enrolled in an eligible Cal Grant A program, the ineligible amount of \$9,708 must be returned.





Income Ceiling Levels Exceeded

Observation: A review of student files revealed two cases in which the student's income exceeded the Commission's income ceiling levels for the 2015-2016 award year.

Requirement: The family income for a dependent/independent student is the parent's/student's total income (TI) as calculated by the Federal Processor. TI is the Adjusted Gross Income plus Untaxed Income minus Taxable Income Offsets.

Required Action: Return the ineligible funds, have the student withdrawn from the Cal Grant Program and submit policies and procedures that will be implemented to ensure that Cal Grant recipients meet all program eligibility requirements prior to the disbursement of Cal Grant funds.



Income Ceiling Example

To determine income ceiling, the CSAC uses the Total Income (TI) as calculated by the Central Processing System (CPS).

$$TI = AGI + \text{Untaxed Income} - \text{Taxable Income Offsets}$$

CSAC INCOME CEILINGS	
Family Size	Income
5	\$51,300
4	\$45,800
3	\$41,200

John was verified as a new Cal Grant B recipient based on an initial TI of \$43,000 with a family size of 5 as reported on the FAFSA. After verification, the TI remained the same but the family size decreased to 3. John would not be eligible because his income is above the ceiling.





Cal Grant Checklist

Information to Verify

1. Program of Study
2. Program Length
3. Eligible CG Program
4. Education Level
5. Start Date
6. SAP
7. E2 Status
8. Citizenship
9. CA Resident
10. Dependency Status
11. Edit Comments

Source Document

1. Transcripts, Enrollment Agreement
2. Catalog, Transcripts, Enrollment
3. School Catalog
4. Transcripts
5. Transcripts, Enrollment Agreement
6. Transcripts, SAP Letters, SAP Policy
7. Transcripts (CC, HS, & BDGI)
8. ISIR, Naturalization Certificate, Affidavit, etc.
9. ISIR, HS Transcripts, Utility Bills, Affidavit, etc
10. ISIR, Taxes, Verification Documents
11. ISIR, Verification Docs, Citizenship Docs, etc.

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Cal Grant Checklist

Information to Verify

- 12. Degree
- 13. Parent Income
- 14. Student Income
- 15. Family Size
- 16. Cost of Attendance
- 17. EFC
- 18. EFA
- 19. Disbursed Amount
- 20. Disbursed Date
- 21. Units Attempted
- 22. Units Completed
- 23. Authorized Signature

Source Document

- 12. ISIR, Transcripts, Diplomas
- 13. ISIR, Taxes, W-2, Verification Docs
- 14. ISIR, Taxes, W-2, Verification Docs
- 15. ISIR, Taxes, Verification Docs
- 16. Budget, Award Letter, Need Analysis
- 17. ISIR, Award Letter, Need Analysis
- 18. Award Letter, Account Ledger, etc.
- 19. Account Ledger, Negotiated Checks
- 20. Account Ledger, Negotiated Checks
- 21. Transcripts, Add/Drop Screens
- 22. Transcripts, Add/Drop Screens
- 23. Negotiated Checks, Authorization



Keys to a Successful Review

- Document, Document, Document!
- Reconcile monthly
- Keep files organized
- Provide a clear audit trail
- Perform self-audits on files
- Ask questions throughout the review process
- Attend Trainings and Webinars
- Consult with Colleagues



California Student Aid Commission

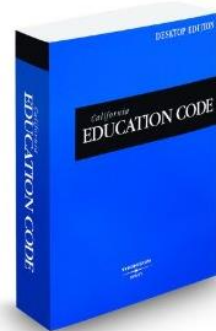
**Institution
Eligibility**





Participation Requirements

- California Education Code § [69432.7\(I\)](#)
- 3 types of colleges/universities
 - California private or independent postsecondary educational institution
 - Nonprofit institution headquartered and operating in California
 - California public postsecondary educational institution



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Participation Requirements

Title IV Eligible School

- Federal student loan borrowers rate 40% or above
 - Three Year Cohort Default Rate less than 15.5%
 - Two Year Graduation Rate greater than 30%

Values certified by CSAC's Research Department
and are acquired from U.S. Department of Education (USED)



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Participation Requirements

- California private or independent postsecondary education institutions
 - Participating in Pell +2 federal student aid programs
 - Federal Work Study Program (FWS)
 - Federal Stafford Loan Program
 - Federal Supplemental Educational Opportunity Grant Program (FSEOG)
- Demonstrate administrative capacity to administer the funds



Application Process

- For new schools, complete the application process:
 - Cal Grant Institutional Participation Agreement
 - School Information Survey
 - Program Review Survey
 - College Cost Estimate
 - Current Catalog
 - Proof of Title IV participation (if applicable)
 - Audited financial statements
 - Grant disbursement/refund policy



Renewal Process

- For renewal schools:
 - Complete the renewal IPA
 - Update contact information
 - Proof of interest bearing account
 - Update policies (if applicable)
 - Confirm current WebGrants users
 - Proof of Title IV allocation (if applicable)
 - Proof of Title IV disbursement (if applicable)



Status of the 2017-21 IPA

- Commission approved an 2017-21 IPA
- Duration: July 1, 2017-June 30, 2021
- All schools currently in program are due to renew by June 30, 2017



Change to 2017-21 IPA

- Confirmation of an interest bearing account

“The Institution must confirm that the account(s) used in which Cal Grant funds are held is interest bearing when establishing, updating, or during the Agreement renewal process. Confirmation of an interest bearing account is a letter from the banking institution on the bank’s letterhead indicating such or a copy of the bank statement.”

Institutional Participation Agreement
Article III, D(1)(d)



Interest Accrual on Cal Grant Funds

- Beware of “sweeping” funds into general ledger account
 - ANY interest accrued on undisbursed Cal Grant funds must be returned to CSAC
- Check for pennies in account balance
- Due March 1st of each year
 - Interest calculated per each calendar year



Change to 2017-21 IPA

- Disbursement options for Cal Grant B and Cal Grant C

“Cal Grant B and Cal Grant C recipients may elect to receive the full disbursement of their ‘Access’ or ‘Books and Supplies’ awards to use towards educational expenses or have it applied to any outstanding balances on the student’s account. By choosing the first option, Cal Grant B and Cal Grant C recipients are responsible to resolve account balances with their institution. Please see your financial aid office for more information.”

Institutional Participation Agreement
Article IV, C(2)(d)



Consortium Agreements

- A contractual agreement
- Specifies which institution will have financial aid responsibility
- Allows eligibility based on total units
- Authorized under federal regulations contained in 34 CFR Section 600.9
- For more information refer to the federal Student Financial Aid Handbook



Study Outside of California

- If a formal agreement exists, students may be paid Cal Grant benefits to attend colleges outside of California.
- Home campus must make financial aid eligibility determination
- Students should not assume eligibility
- Budgets not automatically changed



Distance Learning

- Cal Grant program participants may receive benefits through distance learning programs if all of the following are true:
 - The campus providing the education is located in California.
 - The student is a California resident.
 - All other Cal Grant eligibility requirements are met.



Change in School Status

- Contact the Commission within 10 days with the occurrence of any of the following:
 - Change of school ownership
 - School closure
 - Addition/loss of additional locations in California
 - Cessation of participation in federal programs or 10% rule
 - Loss of accreditation
 - Changes in school address or personnel

California Student Aid Commission

**Grant
Delivery
System
Modernization
(GDSDM)**





5 Things You Should Know

1. Department of Technology developed a Project Approval Lifecycle (PAL) for all Statewide Project Assessments
2. GDSTM Must Meet the Stage/Gate Model Requirements (which is part of PAL) in order to approve a contract to start the new GDSTM Solution.



5 Things You Should Know

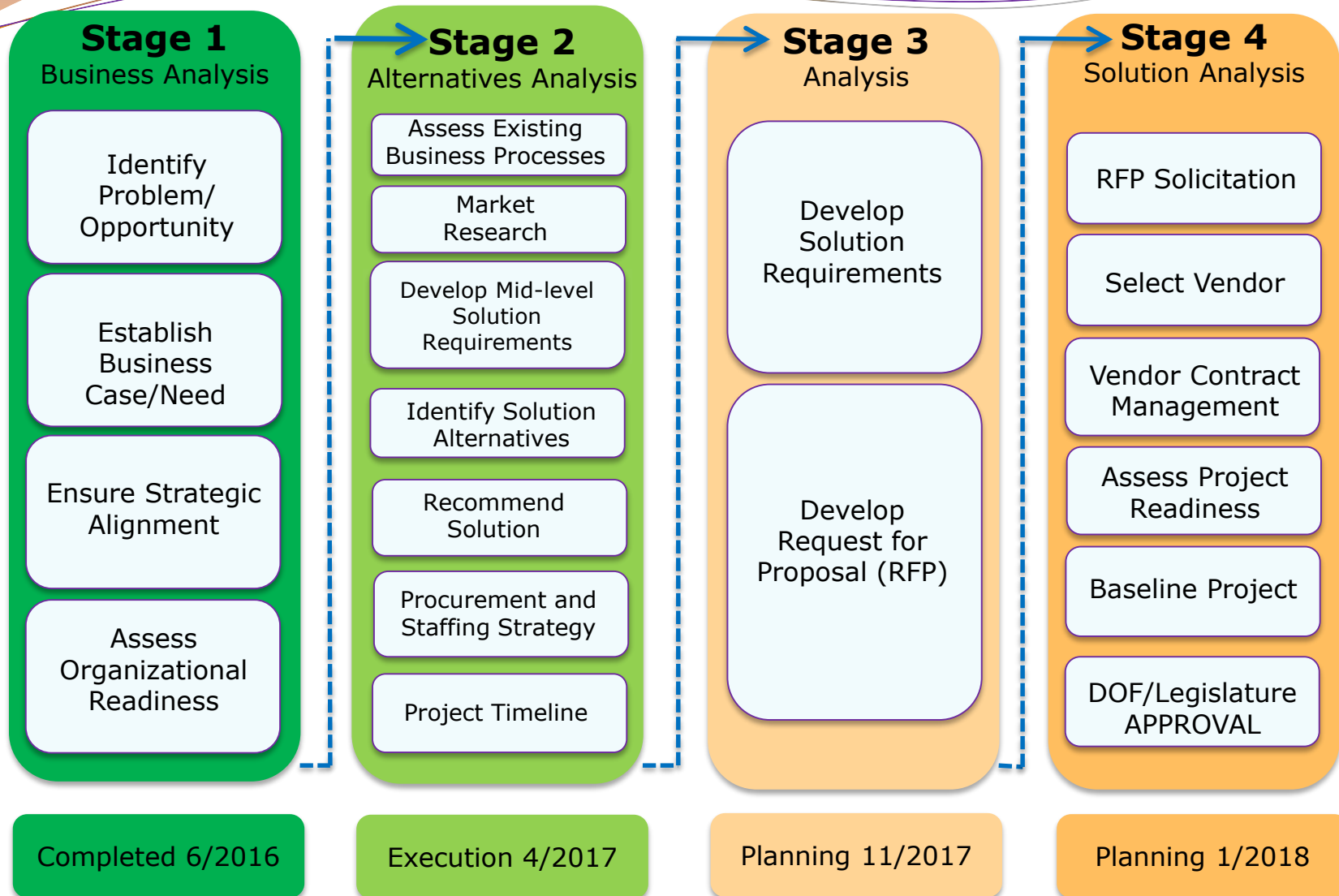
3. GDSM will make WebGrants4Students website and CSAC Applications Compatible with multiple internet browsers, apps, and mobile devices.
4. CSAC hopes to integrate all CSAC Programs into one Application Process and System.
5. Project Launch Date is Targeted for Fall of 2020



Project Stakeholders

- Students/Parents
- High Schools
- Institutions/Universities
- CSAC
- US Department of Education
- California Department of Education
- Military Department – National Guard
- State Controller's Office

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Department of Technology Oversight and State Entity Collaboration

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Project Objectives

1. Allow all external stakeholders to submit required information electronically via interface for all financial aid programs
2. Increase online service, information and make more accessible through the use of mobile technology and devices
3. Provide transparency, accessibility and openness with our data through online and mobile solutions

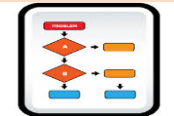





Project Objectives

4. Protect sensitive and confidential data through implementation of robust security and privacy programs
5. Enhance the value of state information through tools to increase the ease of collaboration and data analysis

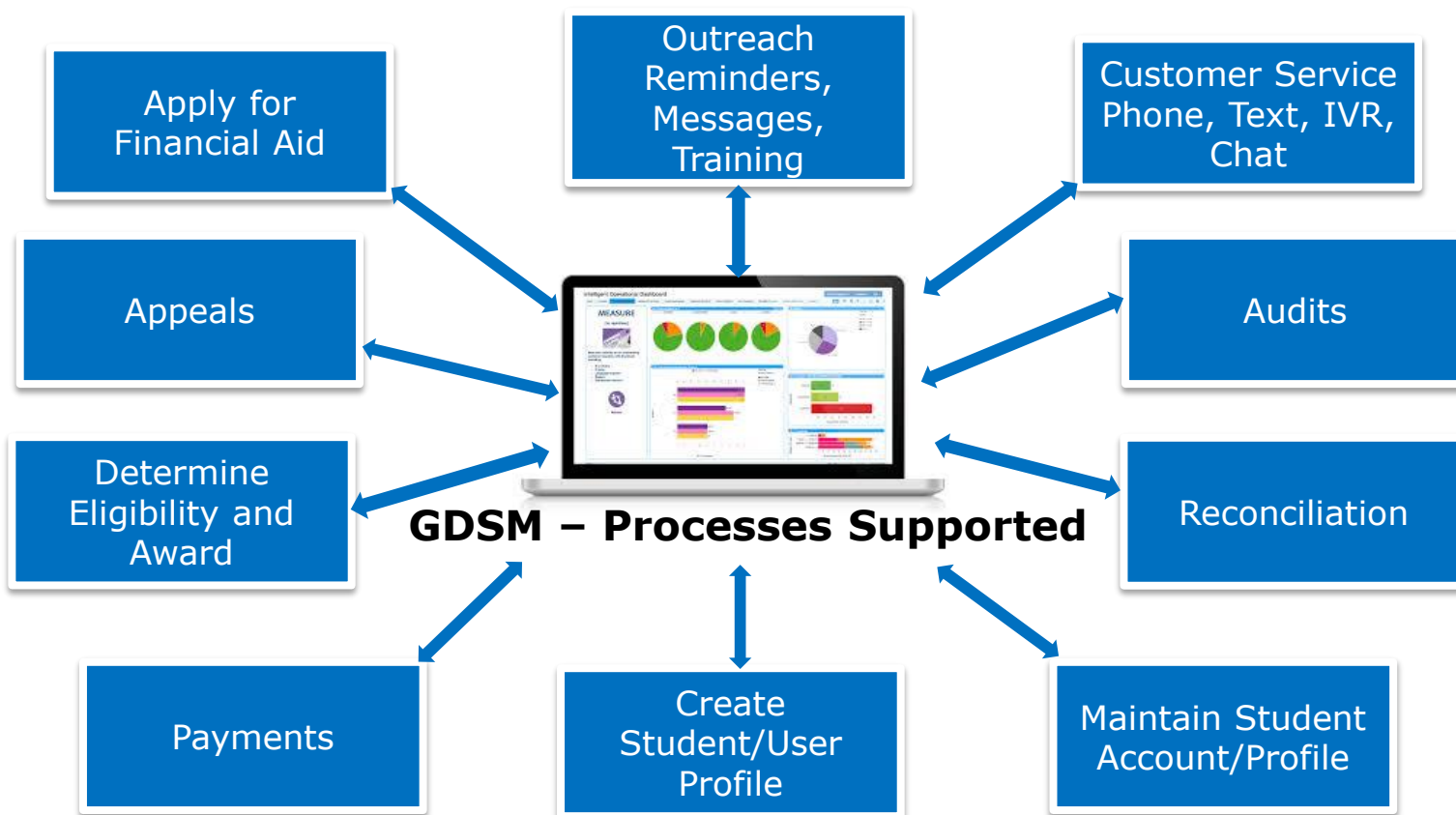


Current vs. Future

Area	Current	Future
Process 	Manual / Paper	<ul style="list-style-type: none"> ✓ Fully Automated ✓ Fast Turn Around ✓ Paperless
Data 	Limited Data Security Risk	<ul style="list-style-type: none"> ✓ Reliable ✓ Evidence Based Decision Making ✓ Traceable Transactions ✓ History Logging
Technology 	Obsolete, Disparate Systems	<u>Latest Technology:</u> <ul style="list-style-type: none"> ✓ Fully Integrated ✓ Business Rules Engine (BRE) ✓ Business Process Management (BPM) ✓ Customer Relationship Management (CRM) ✓ Document Management System (DMS)
People 	Blurred Lines of Responsibility Obsolete Skills	<ul style="list-style-type: none"> ✓ Outreach ✓ Training ✓ Self Service ✓ Anytime, Anywhere



Process and Scope

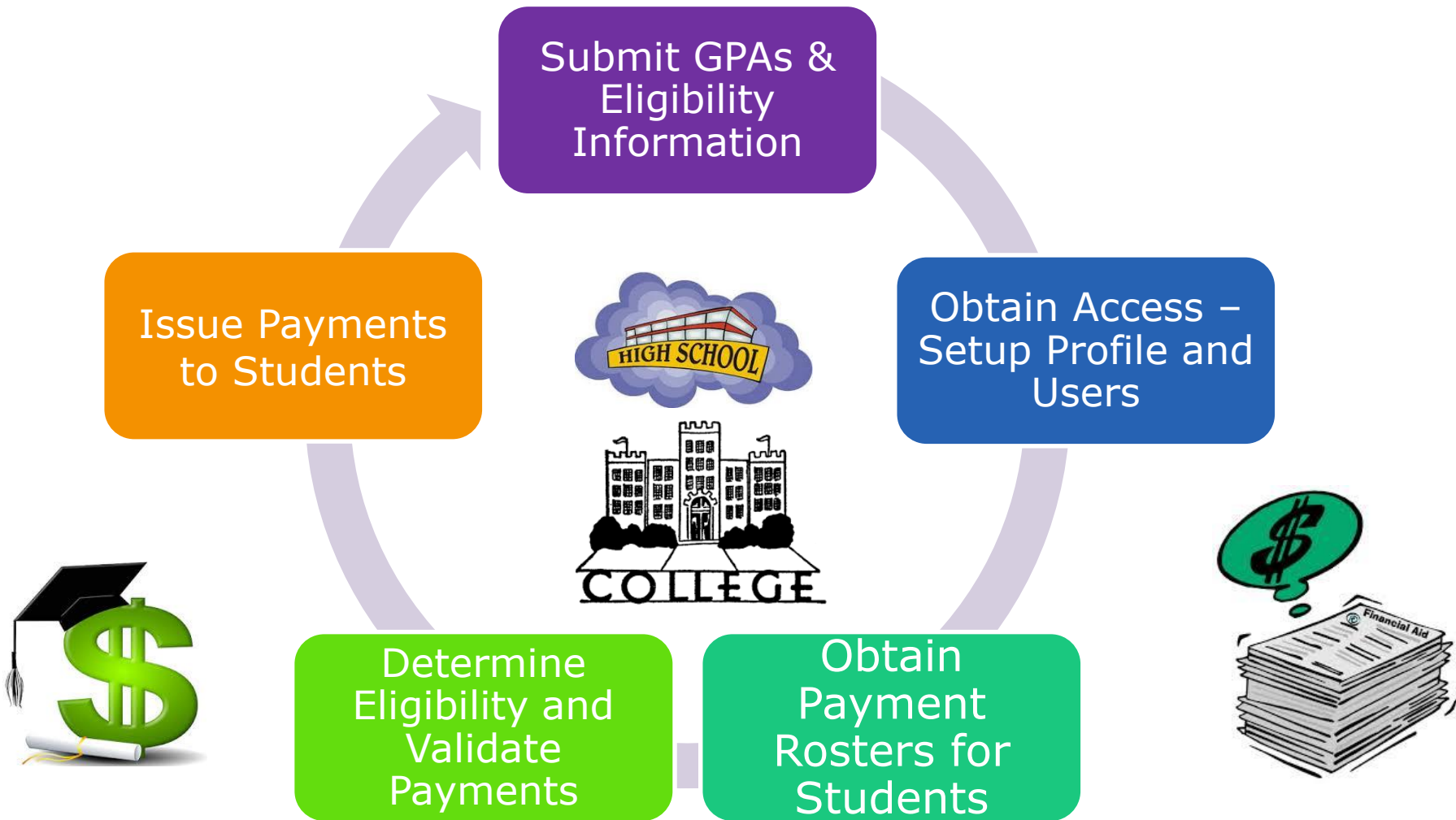


New Business Processes – 11 Core Processes

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Future Institution Access

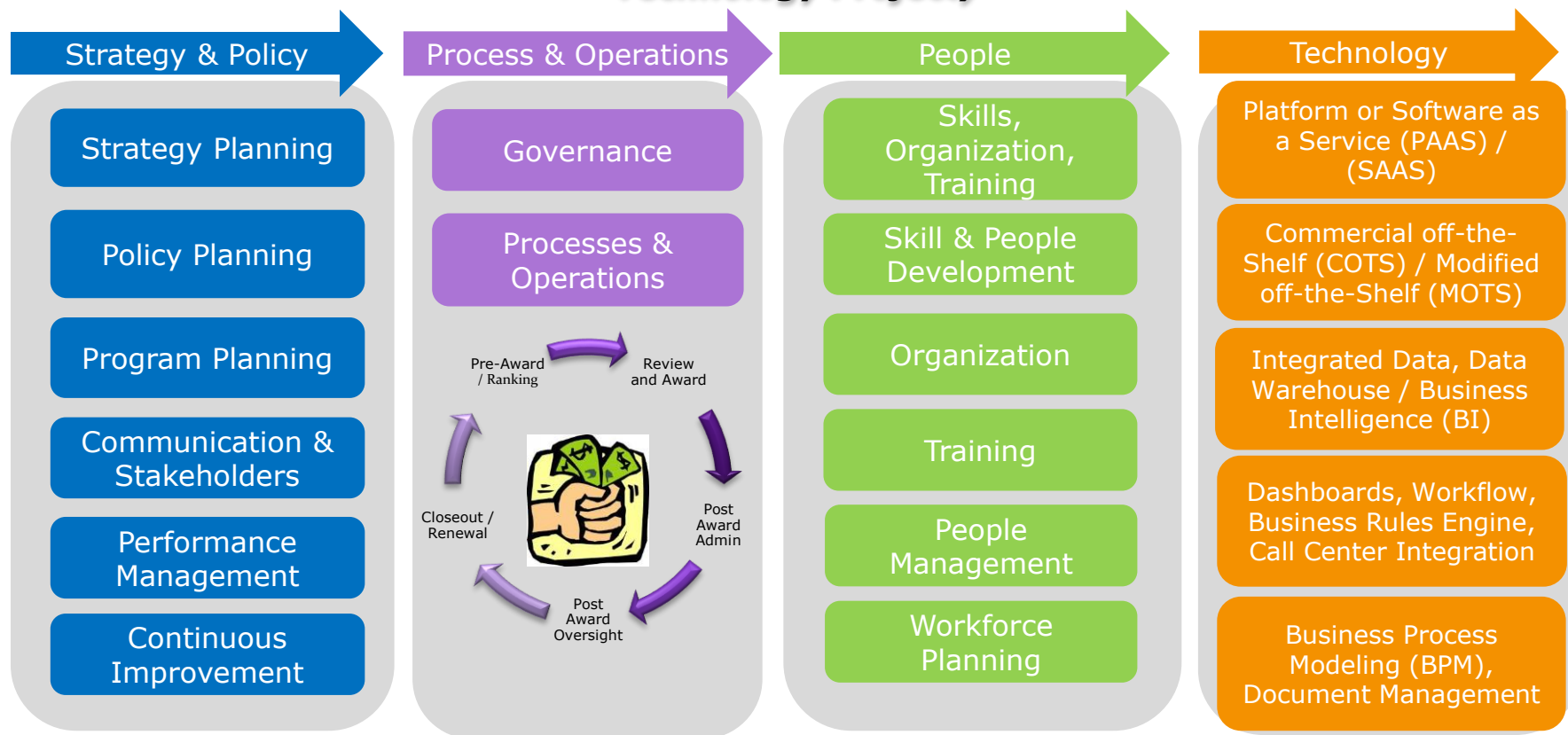


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Approach for GDSM

*Effective grant management must take a comprehensive approach across the lifecycle ensuring strategic alignment to maximize accessibility of opportunities and efficient execution (**NOT Technology Project**)*





Student Portal

Receive
Financial Aid



Apply for
Financial Aid



FAFSA
Renewals

Student Profile



Student
Interaction with
GDSM

College
Calculator
/
Estimator



Customer
Service



File Appeal



2016-2017				
DIRECT COSTS	Tuition	\$41,120	\$41,120	\$41,120
	Standard Fees*	\$ 1,602	\$ 1,652	\$ 1,602
	Room and Board*	\$18,280	\$15,476	\$ 400
	TOTAL DIRECT COSTS	\$61,002	\$58,248	\$43,122
INDIRECT COSTS	Living Allowance	\$ 0	\$ 0	\$ 3,200
	Books	\$ 800	\$ 800	\$ 800
	Personal Expenses	\$ 1,570	\$ 1,570	\$ 1,570
	Transportation	\$ 600	\$ 600	\$ 1,350
TOTAL DIRECT AND INDIRECT COSTS		\$ 63,972	\$ 61,218	\$ 50,042

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Project Champions

**CSAC
Champions:**
Lupita Alcala
Catalina Mistler
Tae Kang
Tabitha Frost
Santiago
Morales
Nai Saeteurn
Justin Watkins
Lisa Wright
Dianna Ximenez
Adrian Felix
Francesca
Hensen

**Cash for
College and
Cal-SOAP
Champions:**
Gina Browne &
Steve Caldwell

**CSU
Champions:**
Dean Kulju
Chip Pierce
Rose
Pasanelli
Doneen
Dawirs

UC Champions:
Patrick
Register
Chris Carter

CCC Champions:
Bryan Dickason
Jana Cox
Marnie Shively
Dennis
Schroeder
Patricia Larkin

**National
Guard:**
Katrina Beck
Clarita
Cortez

**Private
College
Schools:**
Lynn Fox
David Allen
Paul Dieken

**K – 12
Champions**
Christina
Espinoza
Gilbert Viveros

**Additional
Stakeholders
Supported**

**Students and their
Parents**

Private High Schools

State Agencies
CDE, DOF, CDT, LAO,
FTB, CDSS

**Federal Department
of Education**

Research Groups

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California Student Aid Commission

Resources





www.csac.ca.gov



California
Student Aid Commission

Web Grants | Cal Grants | Cash for College | Cal Dream Act | FAFSA

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Cal Grant Channel

Treasurer's College Access Tax Credit Program Supports California's Students
from State Treasurer's Office



04:17 CC HD

Important News



Commission hosted the Symposium on Student Debt

In November, 2014 the Commission hosted the Symposium on Student Debt in California. As of September 2014, total outstanding balance for student loans was at a record high of \$1.31 trillion, according to a Federal Reserve report. That is more than the American debt load for both consumer credit cards (\$881.8 billion) and automobile loans (\$839 billion). Find more information from featured presenters, Commission Meeting video presentation and the **Summary of Commission Symposium on Student Loan Debt**. To read more click [here](#)...




FUND YOUR FUTURE

EXPLORE!
BACHELOR'S DEGREE
COLLEGE GRANT
THE OCTOBER 1, 2014



California
Mobile Gallery

Locate your nearest **Cash for College** workshop using the California Student Aid Commission's Mobile App. It's free and easy! Click [here](#) and select "Set My Location". Use the Student Aid Commission mobile app from any...



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Your e-mail address (required)



☐ Check/Uncheck All Lists

☒ College Financial Aid Administrators (CAA) -
Professionals (Operations Memos, Alerts and
Policy Bulletins)

☒ WebGrants Updates - College
(Announcements, System Status Updates)

☐ High School Professionals (HSP) - (GPA
Verification Forms and Guidelines)

☐ WebGrants Updates - High School
(Announcements, System Status Updates)

☒ Information Technology Updates and
Technical System Information



Before submitting this form, please type the color of the second character:



Submit

Reset



Commission Notifications

**OPERATIONS MEMO**
Update from the California Student Aid Commission

July 11, 2014GOM 2014-22

TO: Financial Aid Administrators
High School Counselors

FROM: Catalina G. Mistler
Chief, Program Administration & Services Division

SUBJECT: 2014-15 Cal Grant Award Amounts and
Dream Act Renewals Eligible to File a FAFSA

This Operations Memo from the California Student Aid Commission (Commission) provides an update on the award amount changes as prescribed in the 2014-15 Budget Act and provides guidance regarding the 2014-15 renewal of Cal Grant Dreamers eligible to complete a Free Application for Federal Student Aid (FAFSA).

2014-15 Cal Grant Award Amounts

**SPECIAL ALERT**
Update from the California Student Aid Commission

June 30, 2014GSA 2014-19

TO: Financial Aid Administrators

FROM: Catalina G. Mistler
Chief, Program Administration & Services Division

SUBJECT: Annual Renewal of WebGrants Access Forms

This Special Alert from the California Student Aid Commission (Commission) reminds institutions of the annual requirement to submit:

- WebGrants Information Security and Confidentiality Agreement (Confidentiality Agreement) and
- WebGrants System Administrator's Access Request Form (Access Request Form) to continue access to WebGrants.

The deadline to submit WebGrants access forms is July 31, 2014.



Grant
Operations
Memo

Grant
Special
Alerts

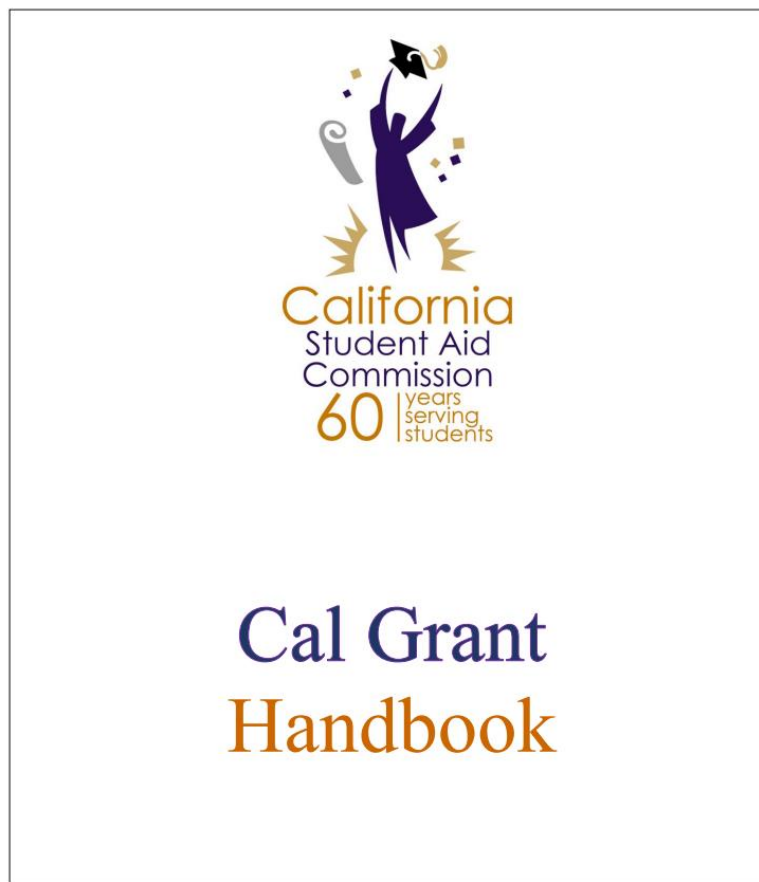
Live
Commission
Meetings

Watch important Commission Meetings at www.csac.ca.gov

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Cal Grant Handbook

http://www.csac.ca.gov/CGM/calgrant_handbook.pdf



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WebGrants

Tools

- ♦ ***Note:** Systems that have upgraded in Excel format with an extension (x) under "Description" for saving the
- ♦ Each of these tools involves downloading a file resident on the user's computer
- ♦ For best results, right click on the
- ♦ A Users Guide containing further

Tools

- ♦ [Roster Data File Compare --](#)
- ♦ [Excel Grant Roster Template](#)
- ♦ [Excel Grant Roster Template](#)

Help Center

...will encounter a file format error while exporting HTML
Excel 2007" to your computer. *See

General Information

- ♦ [Adjustment Reason Codes](#)
- ♦ [Accept/Reject Reason Codes](#)
- ♦ [Changing Your Password](#)
- ♦ [Help with your Account](#)

Publications

- ♦ [Operation Memos and Alerts](#)



User Guides

- ♦ [Accept Reject Screen](#) (Updated April 12, 2007)
- ♦ [Data Transfer for Colleges](#) (Revised October 27, 2011)
- ♦ [Data Transfer for High Schools](#) (Revised October 27, 2011)
- ♦ [Enrollment Data Submission](#) (Revised July 7, 2004)
- ♦ [Getting Started for Colleges](#) (Revised April 15, 2004)
- ♦ [Getting Started for High Schools](#) (Revised November 13, 2003)
- ♦ [High School Graduation Confirmation for High Schools](#) (Revised May 14, 2014)

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On Demand Modules



California
Student Aid Commission

Web Grants | Cal Grants | Cash for College | Cal Dream Act | FAFSA


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Mini - Trainings

The Commission provides on-demand training for high school and financial aid administrators. Each mini-training below is approximately five minutes in length and targets a specific subject. To watch a mini-training, simply select a link below.



Cal Grant

General Information


- [Cal Grant Basics](#)
- [Cal Grant Eligibility](#)
- [Cal Grant A, B, C's](#)

GPA Information

- [Cal Grant GPA Calculations](#)
- [Individual SSN GPA Submission Process](#)
- [SSN GPA Batch Upload](#)
- [Individual Non SSN GPA Submission Process](#)
- [Creating a NON SSN GPA Text File for Batch Upload](#)
- [Uploading a NON SSN GPA Text File](#)
- [NON SSN GPA Matching Process](#)
- [NON SSN GPA Edit Process](#)
- [High School GPA Reports](#)

Payments and Reconciliation

- [Cal Grant Payment Reporting](#)
- [Cal Grant Payment Codes](#)
- [Cal Grant Common Payment Scenarios](#)
- [Cal Grant Reconciliation](#)
- [Cal Grant Reconciliation Reports](#)



WebGrants

General Information

- [Establishing and Accessing WebGrants](#)
- [WebGrants Help Menu](#)
- [WebGrants Tools](#)
- [Student Information Screens in WebGrants](#)
- [CA Dream Act Screens in WebGrants](#)

Navigating Screens

- [High School Graduation Verification](#)
- [Customizing Your Roster](#)
- [Grant Record Changes \(G-21\)](#)
- [WebGrants Reports \(Colleges\)](#)
- [WebGrants for Students](#)

Data Reporting

- [SB 70: Data Reporting](#)
- [SB 70: Uploading Your Text File](#)

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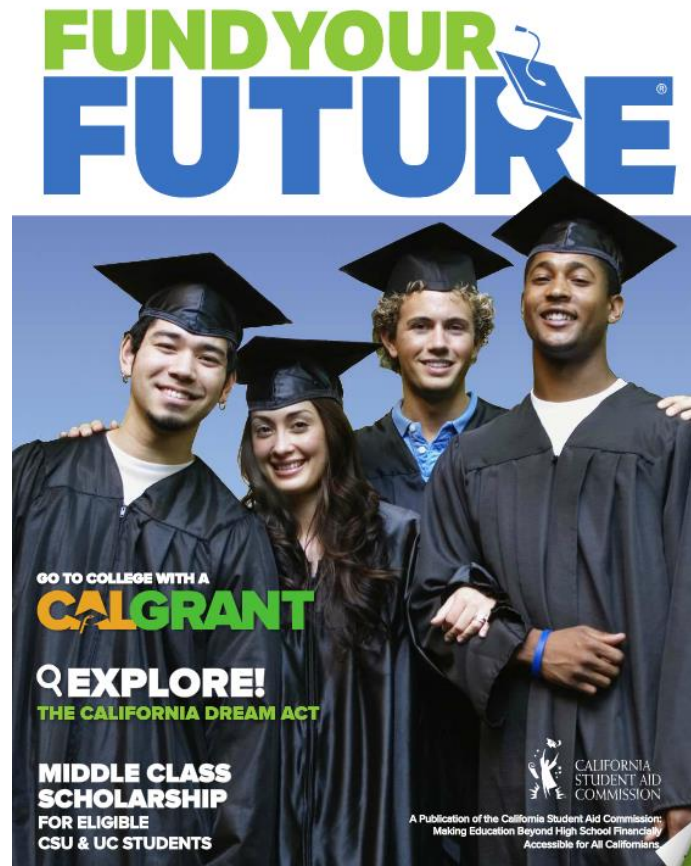
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